

Stakeholder Assessment Report (STAR)  
prepared for  
**Community Health Foundation of Western and  
Central New York**

**VERSION 12/14/2010**



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EFFECTIVE PHILANTHROPY

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# Executive Summary

Stakeholders rate the Community Health Foundation of Western and Central New York (CHF) positively (on average a 5.8 on a 1 to 7 scale) for the favorability of their impressions of the Foundation. In open ended responses, stakeholders frequently describe the Foundation as “strategic” and “engaged.”

**Although the majority of stakeholders agrees that the Foundation has chosen the right goals and perceives the Foundation’s strategies to be effective, stakeholders are less positive about the Foundation’s impact.** Ninety-two percent of stakeholders agree that the Foundation has chosen the right goals by focusing on “some of the most vulnerable populations in the community,” and they indicate that the Foundation’s approaches toward achieving its goals are effective. However, when asked to indicate CHF’s effectiveness in accomplishing each of its three specific goals, only the Foundation’s “Frailty is deferred and elders function successfully” goal received an average rating of 5 or greater on a 1 to 7 scale, and stakeholders rate CHF’s effectiveness in improving how healthcare is practiced and delivered, on average, only a 4.8 (on a 1 to 7 scale). Moreover, stakeholders rate the Foundation’s effect on public policy lower than all other funders whose stakeholders CEP has surveyed, and stakeholders indicate that the Foundation’s lack of focus on public policy is a barrier to achieving greater impact.

**Stakeholders cite CHF leadership and staff as a key strength of the Foundation and benefit from more engaged relationships.** The Foundation’s leadership and staff are frequently mentioned as a key strength of CHF and stakeholders most frequently report using “Foundation staff consultation/subject matter expertise” to learn about the Foundation and support their organizations’ work. They rate this consultation and expertise as the Foundation’s most helpful resource. As one stakeholder explains, “[My contact] has been a font of information, easy to work with and helpful.” Stakeholders benefit from increased engagement with Foundation staff and Board members: stakeholders who report receiving most of their information about the Foundation’s goals and strategy through in-person contact with the Foundation rate significantly higher on most dimensions throughout the report, including the extent to which the Foundation has improved how healthcare is practiced and delivered, its ability to affect public policy and advance knowledge in stakeholders fields, and its understanding of key issues.

**Stakeholder perceptions vary substantially based on the geographic location of their organization.** Stakeholders whose organizations are located outside of western and central New York rate significantly higher than other stakeholders for the favorability of their impression of the Foundation and its understanding of key issues, as well as for the extent to which CHF has improved how healthcare is practiced and delivered, effect on public policy, and for upholding its commitment to keep “people” at the center of its work. Stakeholders whose organizations are located in central New York rate significantly lower than other stakeholders for the favorability of their impression of the Foundation, CHF’s understanding of key issues, the extent to which the Foundation has improved how healthcare is practiced and delivered, and CHF’s effect on public policy. Additionally, sixteen percent of stakeholders mention “geography” as a key weakness of CHF and often cite the Foundation’s “lack of presence in central New York.”

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## Contact Information

- ◆ This report was produced for Community Health Foundation of Western and Central New York by the Center for Effective Philanthropy in November 2010.
  
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# Methodology (1)

- ◆ CEP surveyed stakeholders of Community Health Foundation of Western and Central New York (“CHF”) during October 2010. The target population was selected by CHF. CEP used a confidential survey that was distributed electronically. The details of CHF’s survey is as follows:

Survey Period	Number of Stakeholders Surveyed	Number of Responses Received	Survey Response Rate <sup>1</sup>
October 2010	790	399	51%

- ◆ Stakeholders were asked to indicate their familiarity with the Foundation.

Stakeholder Familiarity with the Foundation				
	Very Familiar	Familiar	Familiar in Name	Not Familiar
CHF	44%	48%	6%	2%
Average Funder	47%	47%	4%	2%

## Methodology (2)

- ◆ CEP surveyed stakeholders on a range of topics, eliciting perspectives regarding CHF's impact, processes, and opportunities to increase its effectiveness.
  - ◆ Most questions on the survey were answered on a 1-7 Likert scale on which 1 is the least positive response and 7 is the most positive.
  - ◆ Stakeholders were also asked to comment in response to open-ended questions throughout the survey. Selected comments are shown throughout this report. This selection of comments highlights major themes and reflects trends in the data. These selected comments over-represent negative comments about the Foundation in order to offer foundation leadership a wide range of perspectives.
- ◆ CHF's average and/or median ratings are compared to the average and/or median ratings from stakeholders in CEP's comparative dataset. This tool is not meant to be a comprehensive benchmarking study. The foundations included are not representative of all foundations.

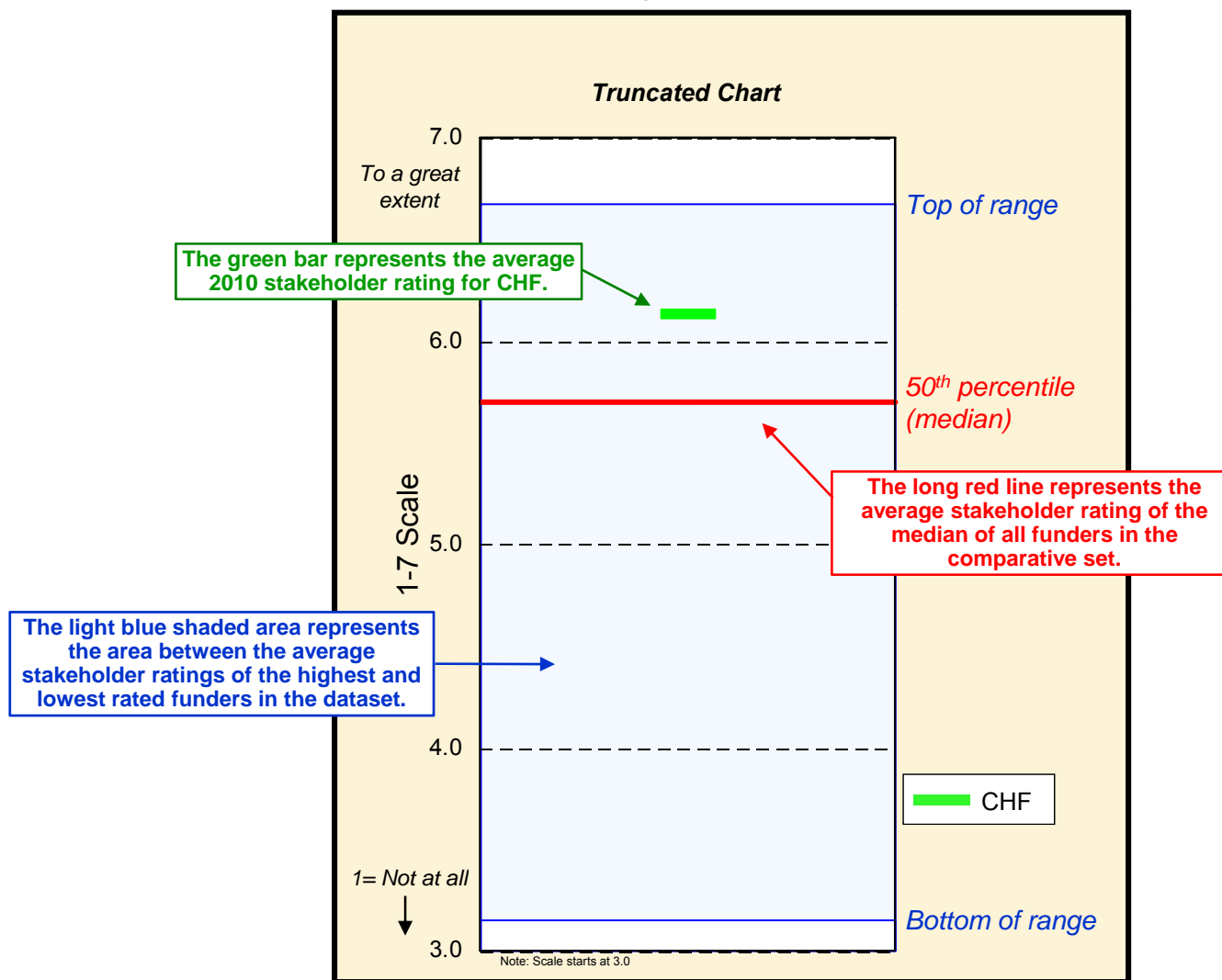
Characteristics of the Comparative Set	
Stakeholder Responses	1,749 stakeholders
Foundations	12 foundations

- ◆ Foundations included in the comparative set:

Foundations in the Comparative Set	
Blue Cross Blue Shield of Massachusetts Foundation	Kansas Health Foundation
Boston Foundation	Lumina Foundation for Education
California HealthCare Foundation	Nellie Mae Education Foundation
The Colorado Health Foundation	Skillman Foundation
Flinn Foundation	The Rhode Island Foundation
Helen Andrus Benedict Foundation	Community Health Foundation of Western and Central New York

# Reading Charts on the STAR

Much of the stakeholder perceptual data in the STAR is presented in the format below. These charts show the average of stakeholder responses for CHF and the range and median of foundation ratings in the comparative dataset. Throughout the report, many charts in this format are truncated from the full scale because funder averages fall within the top half of the absolute range.





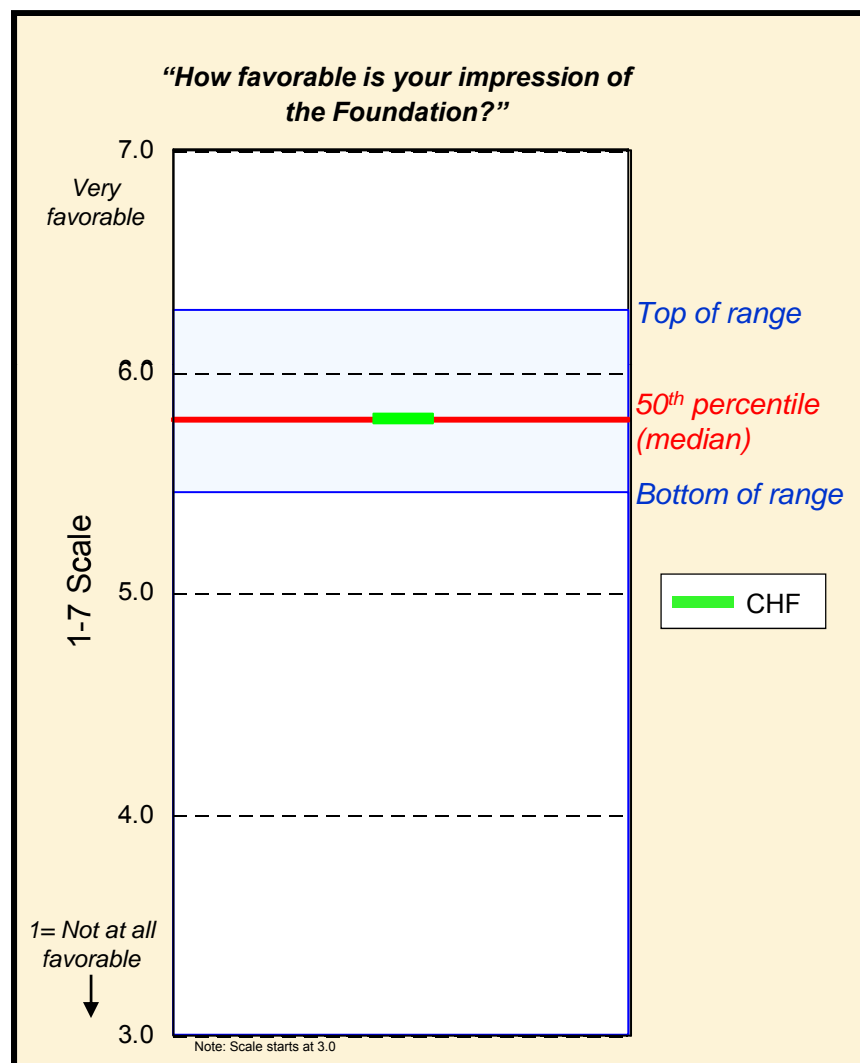
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# Favorability of Impressions of Foundation

On the favorability of stakeholders' impressions, CHF is rated:

- Similarly to the median funder



# Foundation Descriptors

Stakeholders were asked to provide three words that describe the Foundation today. A number of positive themes emerge, and only 10 percent of stakeholders offer a negative descriptor of the Foundation. A total of 931 words were provided by 368 stakeholders of CHF.

*“What three words best describe the Foundation today?”*

	Categories of Words Describing CHF	Proportion of Stakeholders Citing Category	Examples of Words in this Category
General Words	Regional/Community	18%	Community based, Buffalo area, regional, local
	Health-Related Topics	17%	Access to care, dental health, elder care, vulnerable populations
	Organizational Values	15%	Professional, integrity, objective, progressive
	Funds	10%	Funding, grants, philanthropic, well-endowed
Positive Words	Strategic	36%	Focused, proactive, outcomes-driven, gap-filling
	Engaged	28%	Committed, concerned, dedicated, involved
	Innovative	23%	Creative, cutting-edge, innovative, ground-breaking
	Supportive	22%	Accessible, accommodating, helpful, supportive
	Resource	15%	Generous, informative, knowledgeable, expert
	Collaborative	14%	Collaboration, connected, convener, network
	Leader	13%	Influential, important, leader, respected
	Impact	12%	Change agent, impactful, follow-through, effective
Negative Words	Negative Words	10%	Exclusive, ineffective, invisible, limited focus

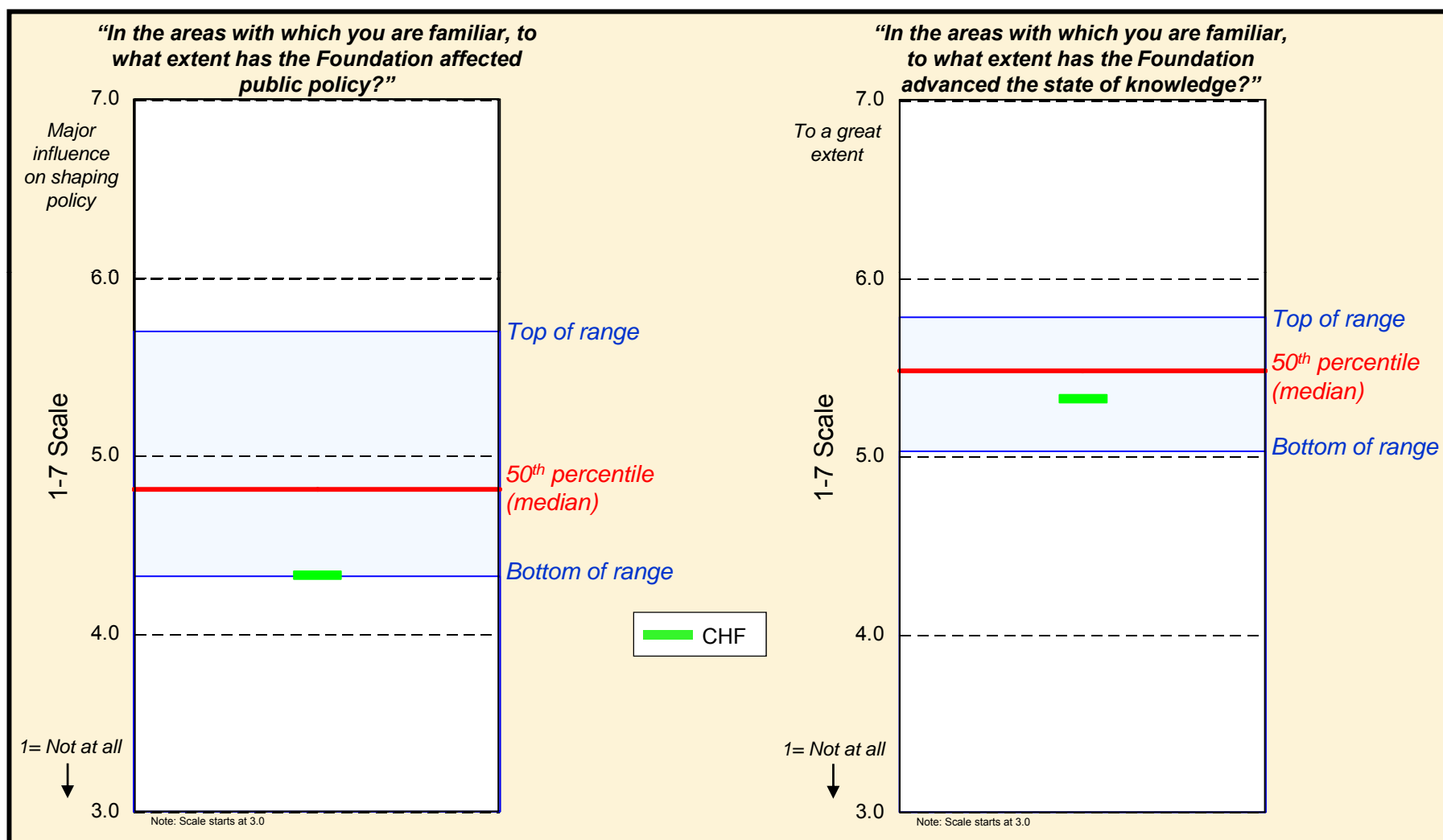
# Foundation's Effect on the Field

On its effect on public policy, CHF is rated:

- Below all other funders whose stakeholders CEP has surveyed

On the extent to which it has advanced the state of knowledge, CHF is rated:

- Similarly to the median funder

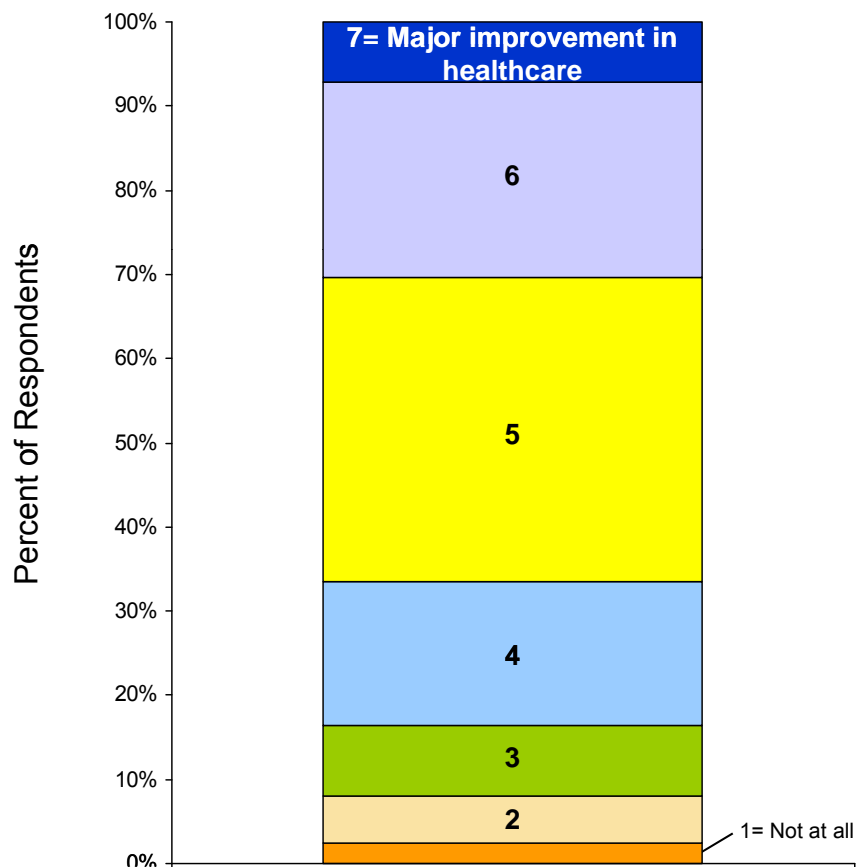


Note: The questions depicted on these charts include a "don't know" response option. In the left-hand chart, 26 percent of CHF respondents answered "don't know", compared to 16 percent at the median funder. In the right-hand chart, 9 percent of CHF respondents answered "don't know", compared to 7 percent at the

# Foundation's Impact on Healthcare

Stakeholders were asked to indicate to what extent the Foundation has improved how healthcare is practiced and delivered.

*"In the areas of the Foundation's work with which you are familiar, to what extent has the Foundation improved how healthcare is practiced and delivered?"*



**Average Rating** 4.8  
**Percent of Respondents that Answered "Don't know"** 14%

Note: Comparative data not available because question only asked of CHF stakeholders.

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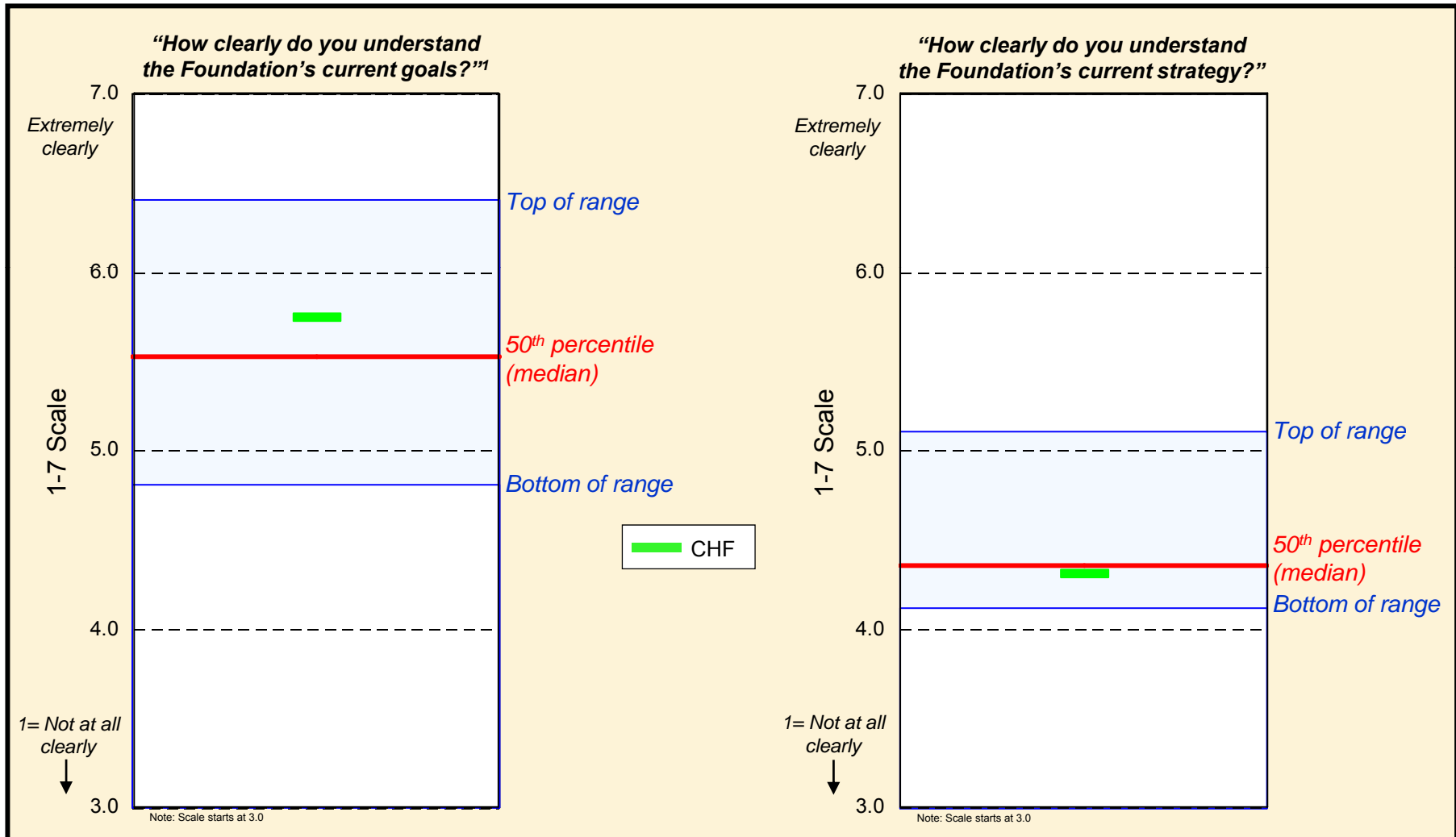
# Stakeholder's Understanding of Goals and Strategy

On the clarity with which its stakeholders' understand its goals, CHF is rated:

- Similarly to the median funder

On the clarity with which its stakeholders' understand its strategy, CHF is rated:

- Similarly to the median funder



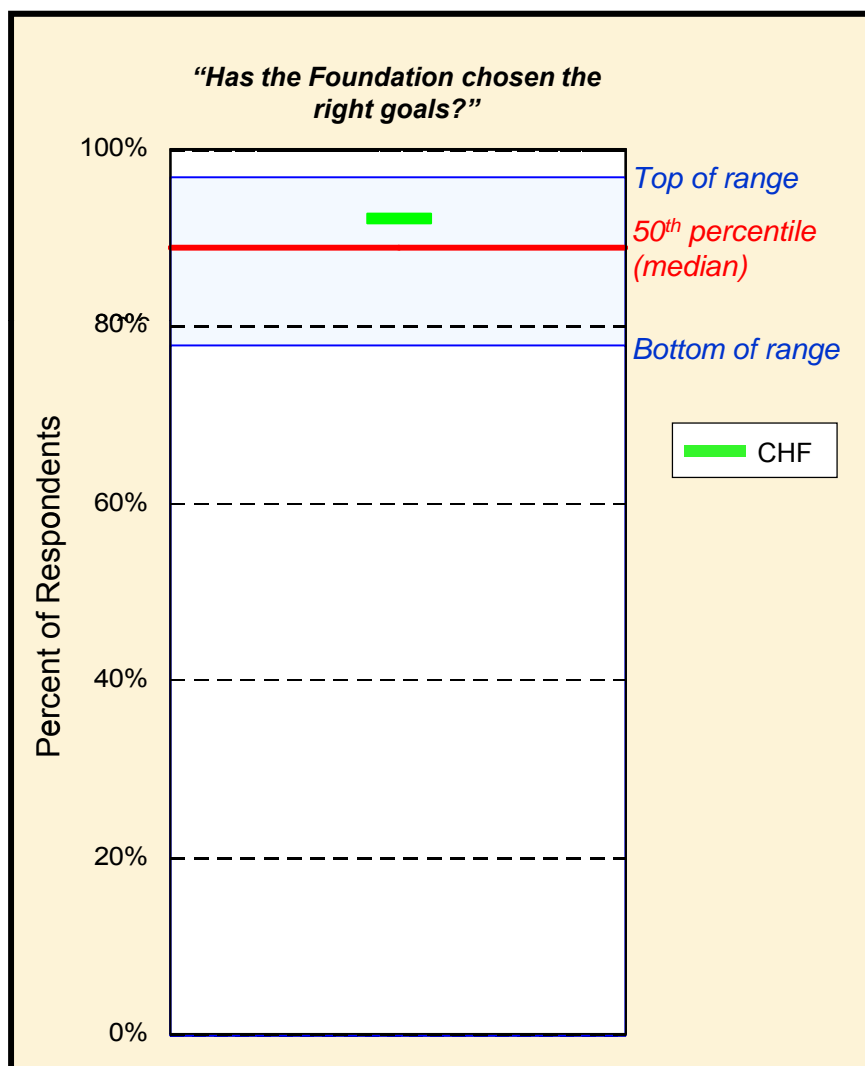
1: Stakeholders were asked to consider each Foundation’s specific goals when answering this question.

Note: The question depicted on the right-hand chart included “The Foundation doesn’t appear to have a strategy” as a response option; 1 percent of CHF respondents answered “The Foundation doesn’t appear to have a strategy”, compared to 3 percent at the median funder.

# Foundation's Choice of Goals

The proportion of CHF stakeholders who indicate that the Foundation has chosen the right goals is:

- Similar to that of the median funder



## Selected Stakeholder Comments

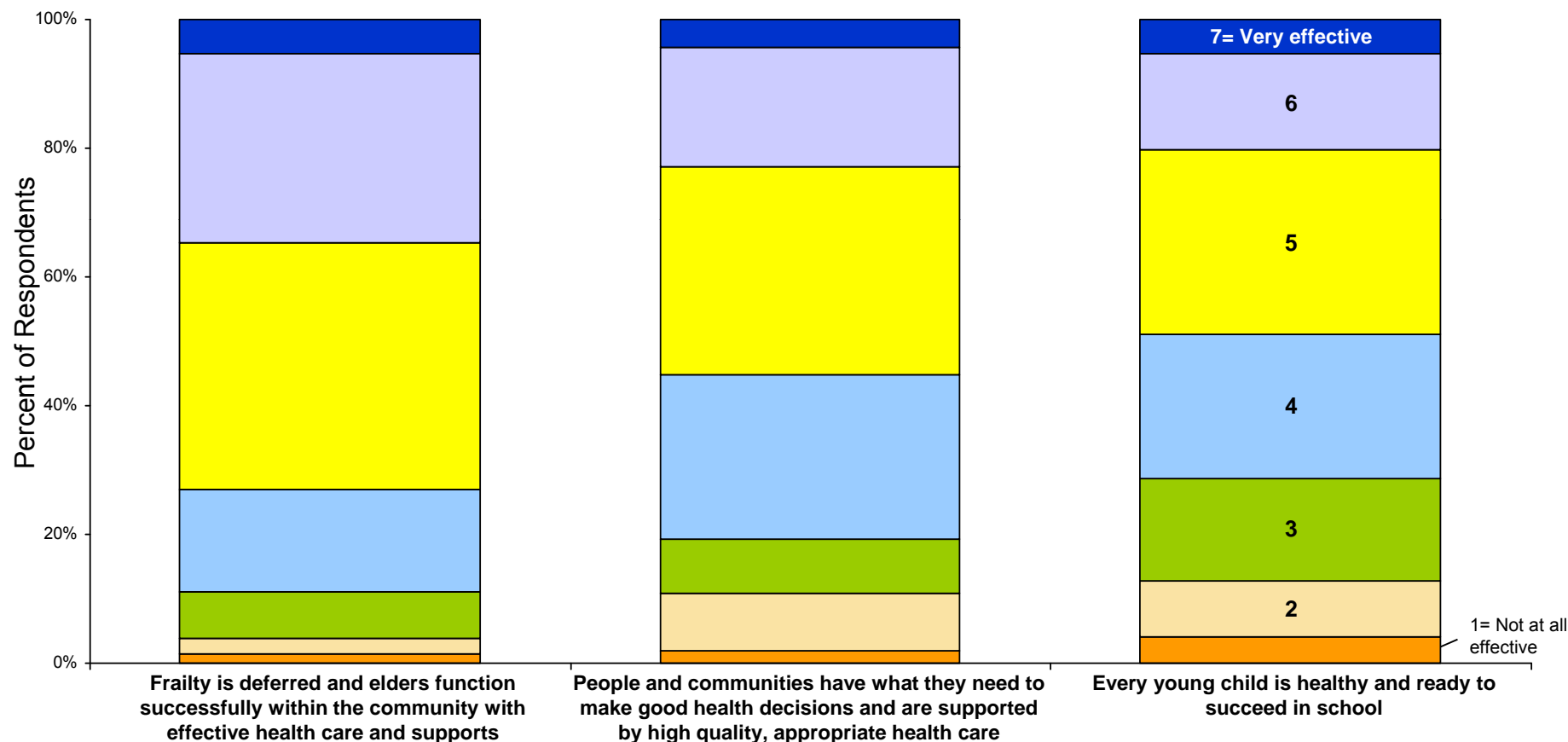
- ◆ *"These are THE issues in WNY and specifically in the rural communities. I believe it helps to have targeted specific age cohorts."*
- ◆ *"These topics are very important to our community and are not duplicative."*
- ◆ *"I would think the Foundation would want to broaden its net, not be so narrowly focused, to be a resource to more of the community."*
- ◆ *"No one else is focusing on frail elders, so they are meeting a critical need, others are focusing on good health decisions and getting children ready for school so that makes for a great point of collaboration with other foundations."*
- ◆ *"Health is inclusive but with the specialized interest in frail elders and young children enables certain activities, it leaves out whole swaths of the community."*
- ◆ *"Would like to see the Foundation take on a broader approach to healthcare and engage the family unit instead of viewing elders and children in silos."*



# Effectiveness in Accomplishing Specific Goals (1)

Stakeholders were asked to indicate the Foundation’s effectiveness in accomplishing each of its specific goals.

“In your opinion, how effective is the Foundation at accomplishing each of its specific goals?”



Average Rating	5.0	4.5	4.3
Percent of Respondents that Answered “Don’t know”	32%	23%	31%

## Effectiveness in Accomplishing Specific Goals (2)

Stakeholders were asked to comment about the effectiveness of the Foundation in achieving its specific goals.

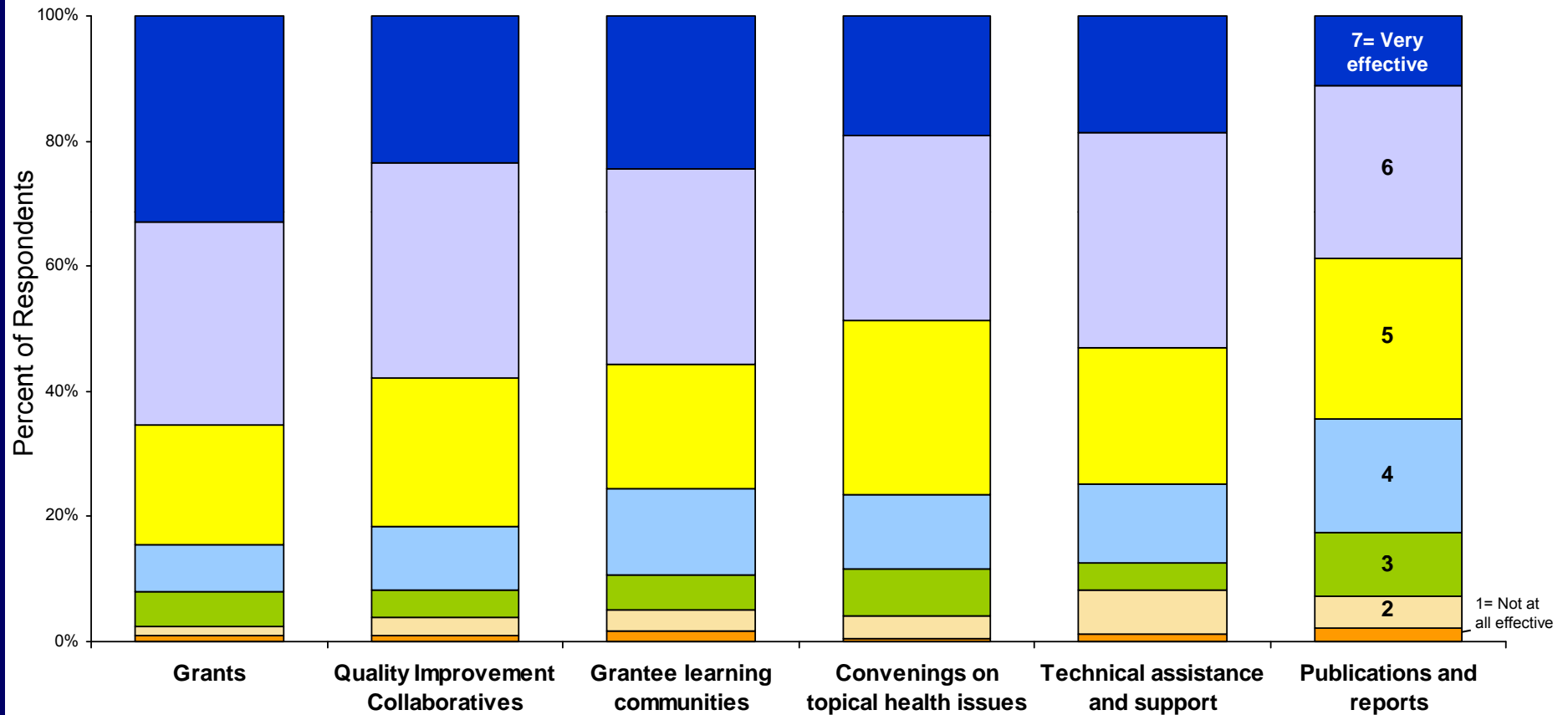
*“In your opinion, how effective is the Foundation at accomplishing each of its specific goals?”*



# Effectiveness of Approach toward Achievement of Goals

Stakeholders were asked to indicate the effectiveness of the Foundation's different approaches toward achieving its goals.

*"Please indicate the extent to which each of the following approaches is effective in supporting the Foundation's ability to achieve its goals."*



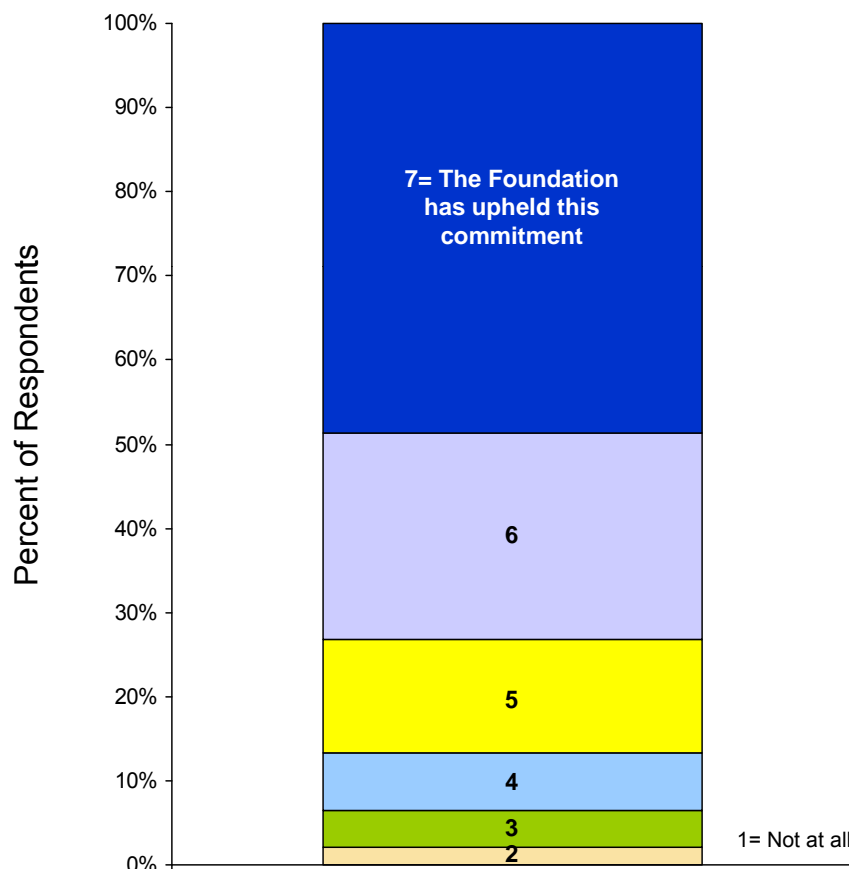
Average Rating	5.7	5.5	5.4	5.3	5.2	4.9
Percent of Respondents that Answered "Don't know"	13%	11%	18%	10%	17%	14%

<sup>1</sup>Note: Comparative data not available because question only asked of CHF stakeholders.

# Foundation's Commitment to People

Stakeholders were asked to indicate to what extent the Foundation has upheld its commitment to keep “people” at the center of its work. Sixty-five percent of stakeholders strongly agree that the Foundation has upheld this commitment, rating a 6 or 7 on this measure.

*“In the areas of the Foundation’s work with which you are familiar, to what extent do you believe the Foundation has held to its commitment to keep “people” at the center of its work?”*



**Average Rating** 6.0  
**Percent of Respondents that Answered “Don’t know”** 5%  
**Percent of Respondents that Answered “I was unaware of this Commitment”** 8%

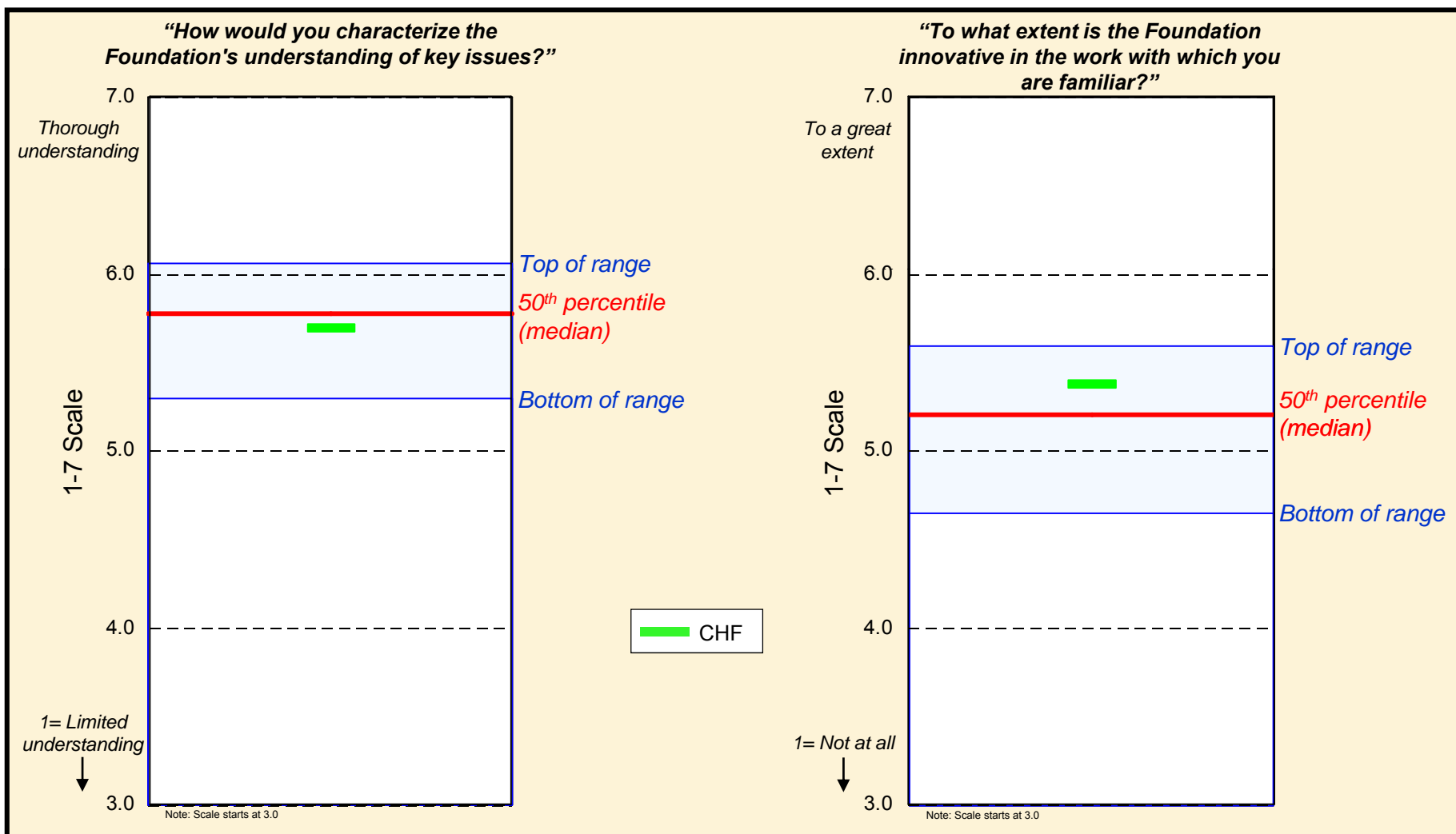
# External Focus of the Foundation

On the thoroughness of its understanding of key issues, CHF is rated:

- Similarly to the median funder

On the extent to which the Foundation is innovative, CHF is rated:

- Similarly to the median funder



Note: The questions depicted on these charts include a “don’t know” response option. In the left-hand chart, 4 percent of CHF respondents answered “don’t know”, compared to 3 percent at the median funder. In the right-hand chart, 7 percent of CHF respondents answered “don’t know”, compared to 7 percent at the median funder.

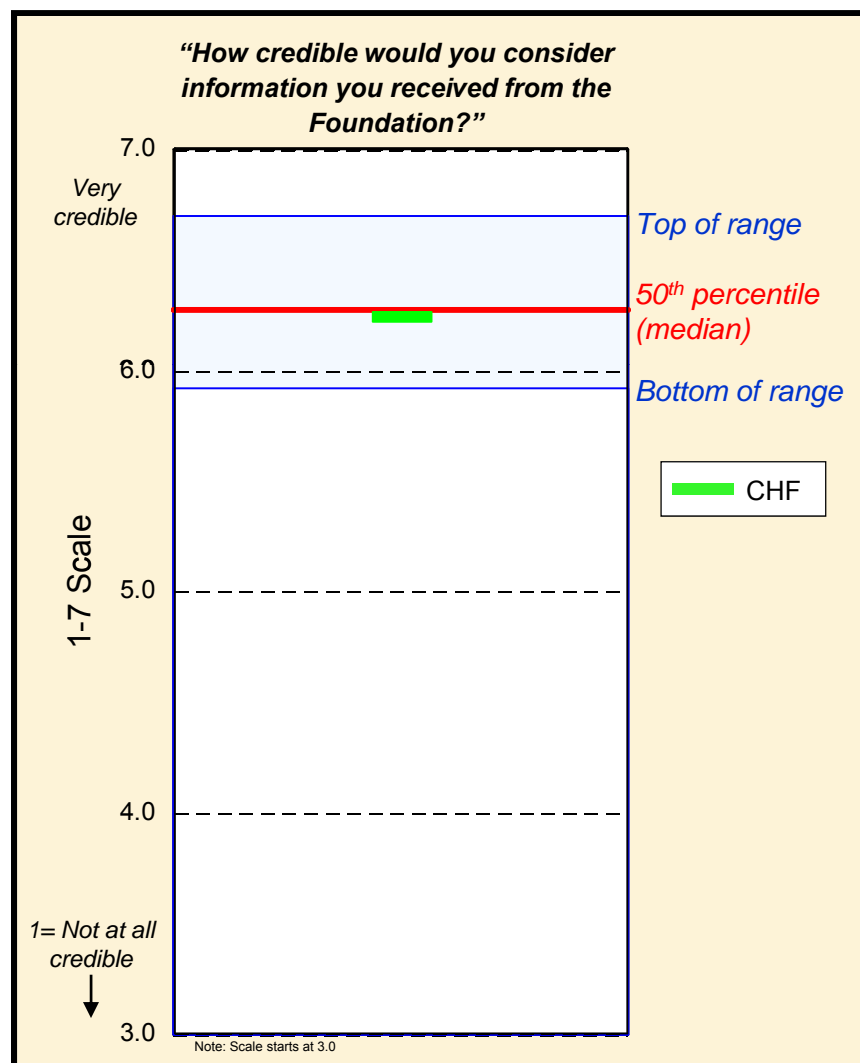
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# Credibility of Information from the Foundation

On the credibility of information provided by the Foundation, CHF is rated:

- Similarly to the median funder

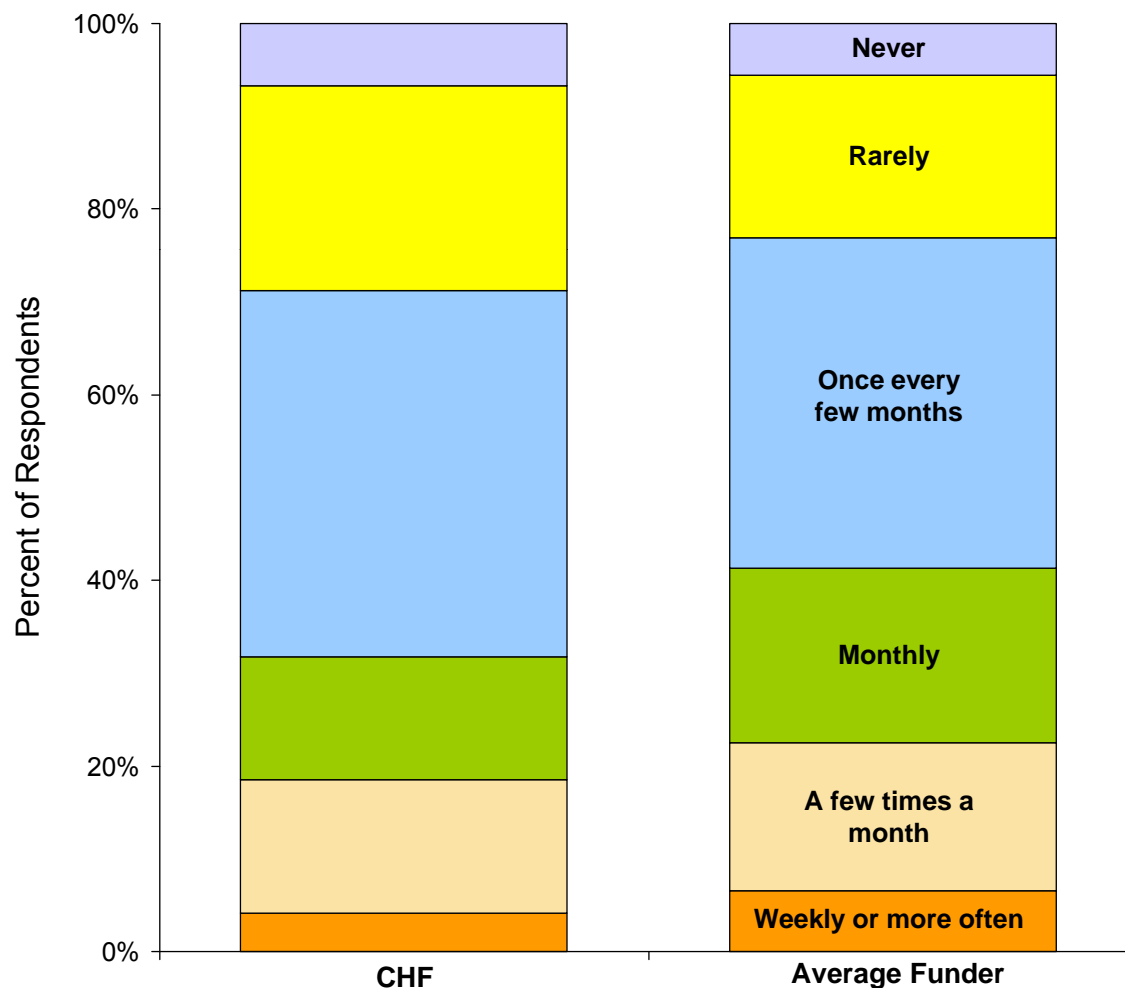


# Use of Foundation Resources

The proportion of CHF stakeholders that report using the Foundation's resources monthly or more often is:

- Smaller than that of the average funder

*"How often have you used the Foundation's resources within the last year?"*



### CHF Analysis – Variation by Use of Foundation Resources

Stakeholders who use the Foundation's resources monthly or more often rate the Foundation significantly higher than stakeholders who use resources once every few months or less frequently on several measures throughout the report:

- Favorability of impression of the Foundation
- Extent to which the Foundation has advanced the state of knowledge
- Foundation's impact on healthcare
- Upholding the Foundation's commitment to keep people at the center of its work
- Extent to which the Foundation is innovative in its work
- Impression of the Foundation's Board

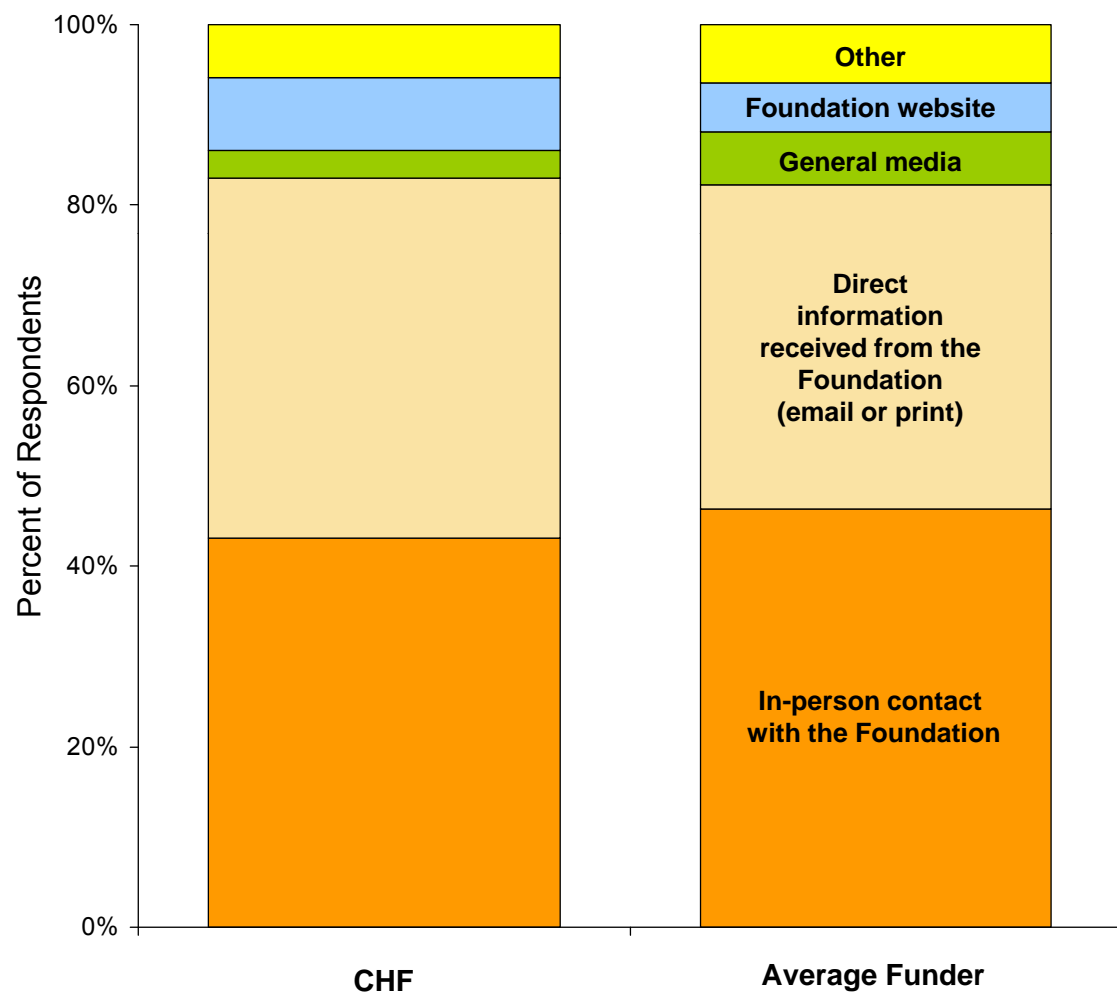


# Information Sources on Goals and Strategies

The proportion of CHF stakeholders that report receiving most of their information about the Foundation's current goals and strategy through in-person contact with the Foundation is:

- Similar to that of the average funder

*“What is the primary information source from which you learn about the Foundation's current goals and strategy?”*



## CHF Analysis – Information Sources on Goals and Strategies

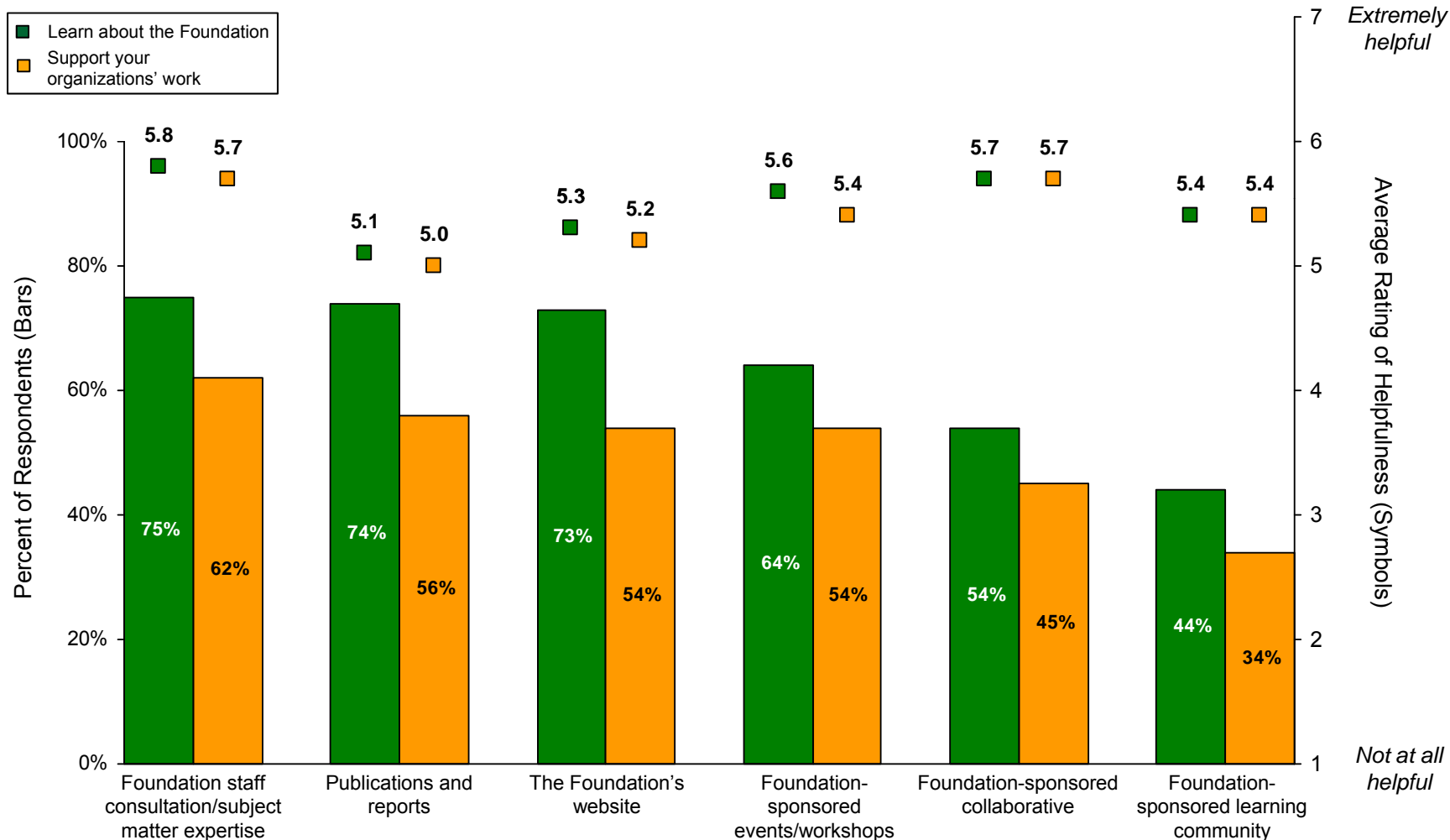
Stakeholders who learn about the Foundation's goals and strategies through in-person contact with the Foundation rate significantly higher on several measures throughout the report:

- Favorability of impression of the Foundation
- Extent to which the Foundation has advanced the state of knowledge
- Foundation's effect on public policy
- Foundation's impact on healthcare
- The Foundation's understanding of key issues
- Upholding the Foundation's commitment to keep people at the center of its work
- Understanding of the Foundation's goals
- Extent to which the Foundation is innovative in its work
- Credibility of information provided by the Foundation
- Impression of the Foundation's staff
- Responsiveness and accessibility of Foundation staff

# Stakeholder Use of Foundation Resources

Stakeholders most frequently utilize “Foundation staff consultation/subject matter expertise” to learn about the Foundation and support their organizations’ work.

*“Please indicate whether you have used any of the following Foundation resources within the last year to learn about the Foundation/support your organization’s work, and if so how helpful was each.”*



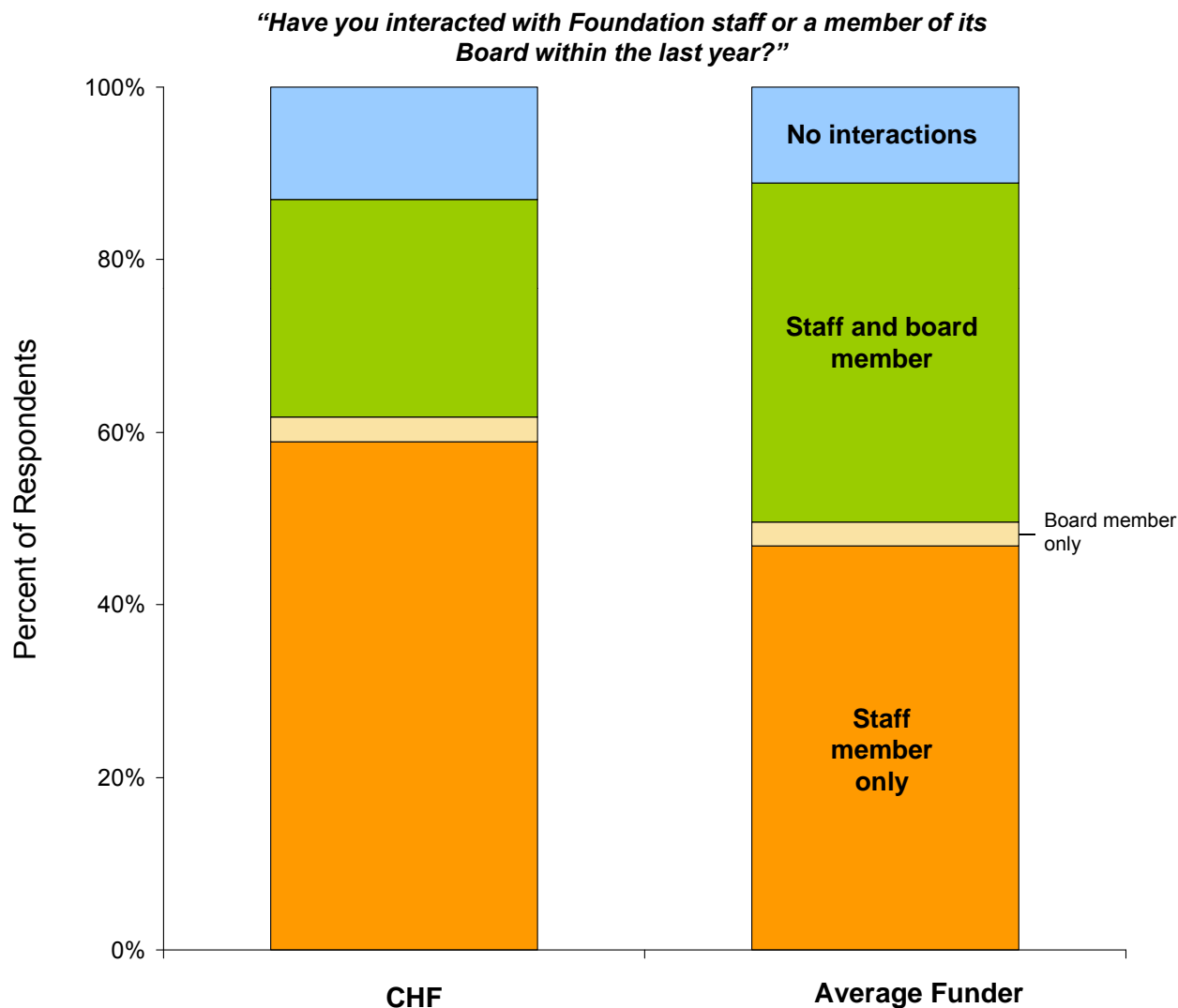
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# Staff and Board Interactions

The proportion of CHF stakeholders that report interacting with both a Foundation staff member and a Foundation board member is:

- Smaller than that of the average funder



# Impressions of Foundation Board and Staff

On average, stakeholders rate their impression of both the CHF Board and staff positively.

*“How would you rate your impression of the Foundation’s staff or board?”*

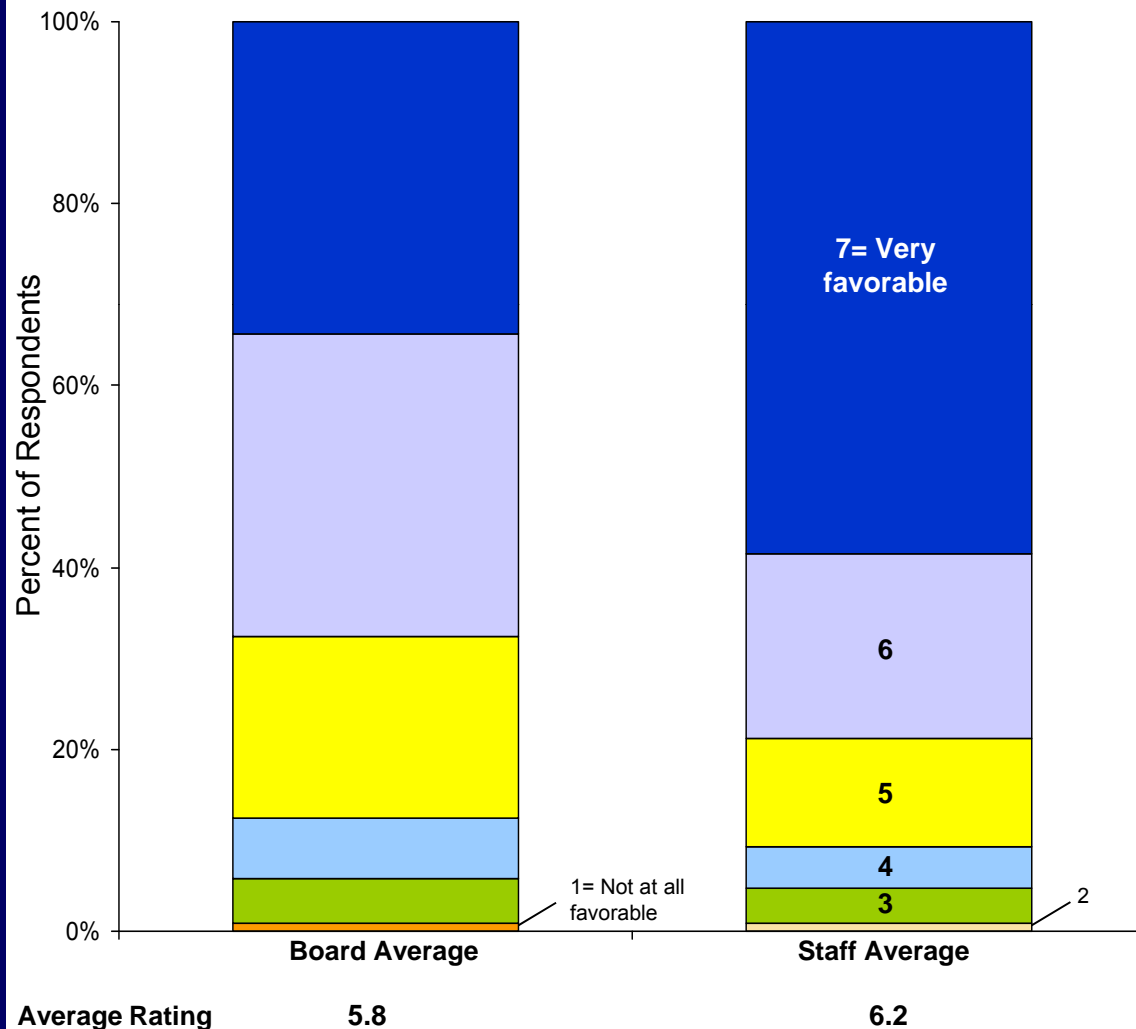
## Selected Comments

### CHF Board:

- *“Committed, caring professionals.”*
- *“In discussing strategy and impact, they really want to do what will have the biggest result. Very innovative in their thinking.”*
- *“It has always been positive. I am happy to see that there is a clear movement to incorporate a younger segment of the community in the Board of Trustees.”*
- *“Much less visible than staff.”*
- *“Limited exposure, but seems more certain of things than warranted.”*

### CHF Staff:

- *“Enthusiastic, knowledgeable, focused on the Foundation mission.”*
- *“The staff seems interested in lecturing the community rather than assuming the community has its own wisdom to share.”*
- *“I think the staff is sometimes overburdened by work and does not have the time to really build relationships.”*
- *“[My contact] has been a font of information, easy to work with and helpful.”*
- *“Ann M. is a strong leader with an ability to draw you into a vision of better things.”*

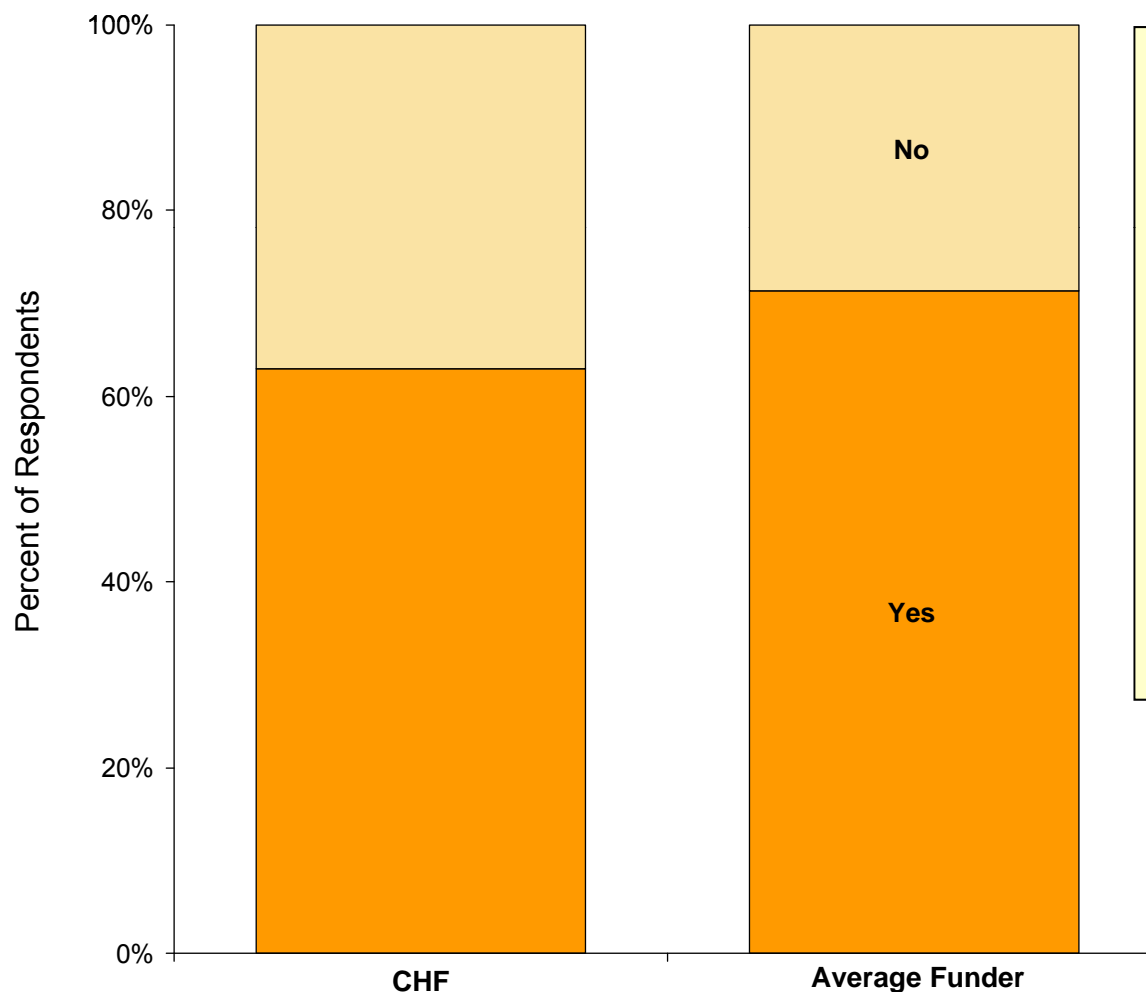


# Initiating Contact with the Foundation

The proportion of CHF stakeholders that initiated contact with staff at the Foundation in the last year is:

- Smaller than that of the average funder

*“Have you initiated contact with staff at the Foundation within the last year?”*



### CHF Analysis – Variation by Initiating Contact with the Foundation

Stakeholders who report initiating contact with staff at the Foundation within the last year rate the Foundation significantly higher than stakeholders who indicate that they have not initiated contact with staff at the Foundation within the last year for their:

- Favorability of impression of the Foundation
- Extent to which the Foundation has advanced the state of knowledge
- Foundation’s effect on public policy
- Foundation’s impact on healthcare
- The Foundation’s understanding of key issues
- Upholding the Foundation’s commitment to keep people at the center of its work
- Understanding of the Foundation’s goals and strategy
- Extent to which the Foundation is innovative in its work
- Credibility of information provided by the Foundation

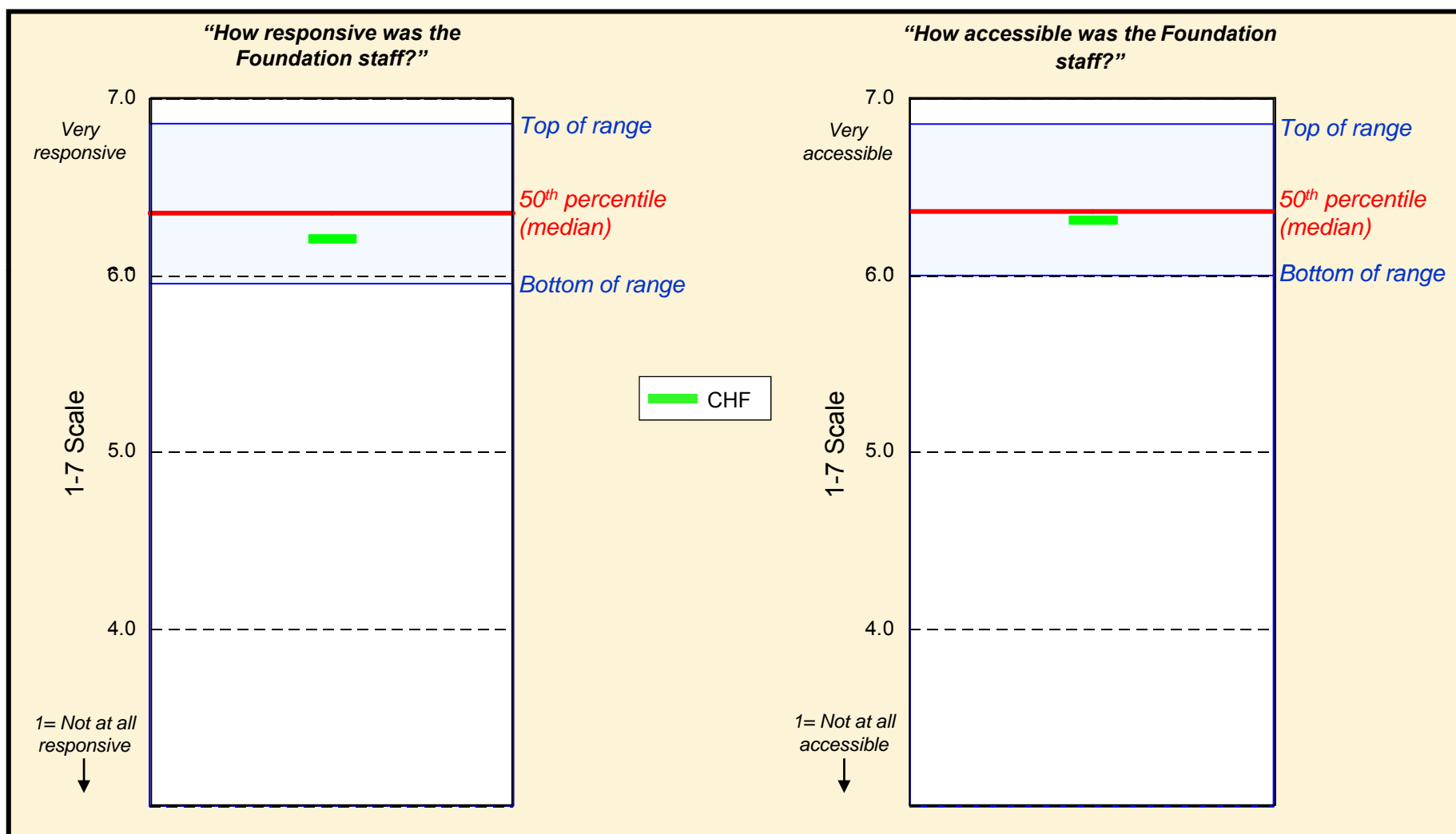
# Impressions of Interactions with Staff

On the responsiveness of its staff, CHF is rated:

- Similarly to the median funder

On the accessibility of its staff, CHF is rated:

- Similarly to the median funder



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# Strengths of the Foundation

Stakeholders were asked to comment about the two greatest strengths of the Foundation. A total of 326 stakeholders mentioned 606 strengths. The largest proportion of comments indicated that the Foundation’s staff/leadership was its greatest strength.

*“What are the Foundation’s two greatest strengths?”*

Topic of Stakeholder Comment	% of Stakeholders Citing Strength	Sample Stakeholder Comments
Staff/Leadership	31%	“Bright, progressive CEO.” “Senior staff.” “Knowledge and expertise of staff.” “Courageous leadership.” “Caring staff.”
Financial Resources	27%	“Funding.” “Assets.” “Endowment size.” “Financial strength.” “Grants.” “Money.”
Focus/Strategy	25%	“Informed approach.” “Narrow range of issues upon which resources are focused.” “Putting research to practice.” “Strategic direction.” “Clear priorities.”
Organizational Values	20%	“Integrity.” “Sincerity.” “Commitment.” “Accessibility and openness.”
Community/Regional Involvement	17%	“Local focus.” “Interest in serving the community.” “Identifying community needs.” “A focused geographic area.” “Regional focus.” “Finger on the local ‘pulse.’”
Ability to Convene/Connections	16%	“Ability to convene.” “Linking the right people together with the right issues.” “Bringing agencies together.” “Contacts.”
Knowledge	12%	“Well-informed.” “Expertise.” “Educators.” “Informed about cutting edge health care innovations.” “Knowledge bank.”
Mission and Vision	12%	“Purpose.” “Vision.” “Clearly defined mission.” “Philosophy.” “Excellent goals.”

# Weaknesses of the Foundation

Stakeholders were asked to comment about the two greatest weaknesses of the Foundation. A total of 209 stakeholders mentioned 309 weaknesses. The largest proportion of stakeholders indicated that the Foundation’s focus/strategy was its greatest weakness.

“What are the Foundation’s two greatest weaknesses?”

Topic of Stakeholder Comment	% of Stakeholders Citing Weakness	Sample Stakeholder Comments
Focus/Strategy	29%	<p><u>Too broad (n=12)</u>: “Trying to do too much.” “Diffuse projects.” “Too wide a focus.” “Broad agenda.” “Large target populations.”</p> <p><u>Too narrow (n=10)</u>: “Scope sometimes limited.” “Narrow focus.” “Limited strategies.” “Tendency to hyper-focus.”</p> <p><u>Other (n=38)</u>: “Unclear strategy.” “Lack of focus/initiatives about young children.” “Over-emphasis on health care versus health.” “Lack of robust population data.”</p>
Communication	21%	<p>“Lack of communication to stakeholders.” “They could be a louder and credible advocate voice in the areas of their mission.” “Getting the word out to the greater community about it’s work and successes.” “Unclear communications.” “Visibility.” “Not publicized enough.”</p>
Engagement and Understanding	17%	<p>“Elitist image.” “Attitude of superiority.” “Not close enough to community.” “Not connecting to some potential partners... Foundation is a bit of an ivory tower.”</p>
Geography	16%	<p><u>Lack of presence in CNY</u>: “Need more attention in Syracuse.” “Lack of well established staff in the Syracuse area.” “Too Western; not enough CNY.” “Limited Central New York visibility.”</p> <p><u>Other</u>: “Unfortunate to be geographically split.” “Minimal rural presence.” “Diffuse geography.”</p>
Resources	13%	<p>“Limited funds.” “Too small.” “Lack of resources.” “More need in community.”</p>
Staff/Leadership	12%	<p>“Short-staffed.” “Staff diversity.” “Staff competencies.” “Staff transition.”</p>
Implementation	11%	<p>“Limited impact on public policies.” “Ineffective in our community.” “Taking community work and changing policy.” “Limited ability to make systems change.”</p>

Note: Comparative data not available due to variation by foundation. Topics mentioned by fewer than 10 percent of stakeholders have not been included.

# Suggestions for the Foundation

Stakeholders were asked to provide suggestions about how the Foundation could improve. The largest proportion of stakeholder comments addressed the Foundation's engagement and understanding.

**"Please suggest any other ways you think the Foundation could improve."**



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# Review of Findings

Chart shows the percentile rank of CHF (◆) among all funders in the comparative set.

Indicator	Average Rating					Survey Question
	3	4	5	6	7	
Favorability of Impression of Foundation						"How favorable is your impression of the Foundation?"
Effect on Public Policy						"In the areas of the Foundation's work with which you are familiar, to what extent has the Foundation affected public policy?"
Advancing the State of Knowledge						"In the areas of the Foundation's work with which you are familiar, to what extent has the Foundation advanced the state of knowledge?"
Stakeholder Understanding of Foundation Goals						"How clearly do you understand the Foundation's current goals?"
Stakeholder Understanding of Foundation Strategy						"How clearly do you understand the Foundation's current strategy?"
Understanding of Key Issues						"In the areas of the Foundation's work with which you are familiar, how would you characterize the Foundation's understanding of key issues?"
Impressions of Board <sup>1</sup>						"How would you rate your impression of the Foundation's board?"
Impressions of Staff <sup>1</sup>						"How would you rate your impression of the Foundation's staff?"

Note: Scales start at 3.0



<sup>1</sup>: Comparative data not available due to changes in the survey instrument.

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## Areas for Discussion (1)

### Disconnect between appropriateness of goals, effectiveness of CHF approaches for goal achievement, and perceptions of current impact

*Although the majority of stakeholders agrees that the Foundation has chosen the right goals and perceives the Foundation's strategies to be effective, stakeholders are less positive and knowledgeable about the Foundation's impact.*

- Ninety-two percent of stakeholders believe that CHF has chosen the right goals and many comment that the Foundation's support "fills a critical gap." Stakeholders also indicate that the Foundation's approaches for achieving its goals are effective – as all but its "Publications and reports" approach receive average ratings above a 5 (on a 1 to 7 scale).
- Despite agreeing with the Foundation's choice of goals and believing that CHF's approaches to achieve them are effective, stakeholders are less positive about the Foundation's impact. Overall, CHF stakeholders rate the extent to which the Foundation has improved how healthcare is practiced and delivered a 4.8 (on a 1 to 7 scale). More specifically, when asked to indicate CHF's effectiveness in accomplishing each of its three specific goals, only the Foundation's "Frailty is deferred and elders function successfully" goal received an average rating of 5 or greater (on a 1 to 7 scale). Additionally, a substantial proportion of stakeholders indicate they "don't know" CHF's effectiveness in accomplishing each of its three goals.
- One theme that emerges as a barrier to impact is the Foundation's limited effect on public policy. Stakeholders rate the Foundation's impact on public policy lower than that of all other funders whose stakeholders CEP has surveyed and suggest that the Foundation should specifically address public policy in its goals and strategy in order to achieve greater impact. One stakeholder cites the Foundation's "temerity in affecting public policy" as a key weakness. Another explains, "The Foundation has succeeded in informing key stakeholders about its goals and efforts to accomplish them. However, I believe it has not succeeded in effectively advocating for the public policy changes to accomplish the goals."
  - *What obstacles exist as barriers to achieving greater impact on the Foundation's main goals?*
  - *How can CHF more clearly communicate its efforts related to goal achievement to better inform its stakeholders?*
  - *Does the Foundation believe that affecting public policy is an important area for focus in the coming years? If so, what opportunities and vehicles does the Foundation have to create new efforts in the area of public policy?*

## Areas for Discussion (2)

### Foundation staff and leadership are a key strength of the Foundation

*Stakeholders cite CHF leadership and staff as a key strength of the Foundation, and they benefit from more engaged relationships.*

- Stakeholders most frequently mention CHF’s staff and leadership as a key strength and rate their impressions of the Board and staff positively (5.8 and 6.2, respectively, on a 1 to 7 scale). Additionally, stakeholders most frequently report utilizing “Foundation staff consultation/subject matter expertise” to learn about the Foundation and support their organizations’ work. They rate this as the Foundation’s most helpful resource. One stakeholder comments, “Unlike other area foundations, the CHF has developed a staff and Board that have the background to understand public health issues,” while another describes his primary contact as “creative, innovative, supportive. A true star!”
- Not surprisingly, given the strength of CHF staff and Board as a resource, stakeholders who have more engaged relationships with CHF and report receiving most of their information about the Foundation’s goals and strategy through in-person contact have significantly more positive impressions of the Foundation. These stakeholders rate higher than stakeholders who receive most of their information from other sources (such as print/email communication, general media, and the Foundation’s website) on many dimensions within this report, including the extent to which the Foundation has improved how healthcare is practiced and delivered, its ability to affect public policy and advance knowledge in stakeholders fields, its understanding of key issues, and the credibility of information provided by the Foundation.
  - *What role does personal interaction play within the Foundation’s strategy for influencing stakeholders?*
  - *Has the Foundation ensured that is targeting personal contact to those stakeholders it most wishes to influence?*



## Areas for Discussion (3)

### Opportunity to deepen the Foundation's understanding of communities it serves

*A minority of stakeholders indicates that the Foundation lacks a deep understanding of the key issues in its engagement with communities it serves in western and central New York.*

- Seventeen percent of stakeholders cite the Foundation's "engagement and understanding" as a key weakness and the largest proportion of stakeholder suggestions for improvement (25 percent) reference this theme. These stakeholders indicate that the Foundation lacks a deep understanding of the key issues in its engagement with communities it serves in western and central New York. In the words of one stakeholder, "The staff seems interested in lecturing the community rather than assuming the community has its own wisdom to share," while another explains, "The Foundation could improve its efforts to cultivate local champions outside of itself."
- When asked to describe the Foundation, 10 percent of stakeholders use negative words. These negative words, such as "exclusive," "controlling," and "micromanagement" often relate to the idea that the Foundation could "listen more, lecture less" as it engages with the communities it serves.
  - *How can the Foundation utilize its staff expertise and leadership capabilities to deepen its understanding of the communities the Foundation serves and create greater impact in its engagement with them?*

## Areas for Discussion (4)

### Variation in ratings across geographic location of stakeholder organizations

*Stakeholder perceptions vary substantially based on the geographic location of their organization.*

- Stakeholders whose organizations are located outside of western and central New York rate significantly higher than other stakeholders for the favorability of their impression of the Foundation, CHF's understanding of key issues, the extent to which the Foundation has improved how healthcare is practiced and delivered, and CHF's upholding its commitment to keep "people" at the center of its work.
- Stakeholders whose organizations are located in central New York indicate less positive perceptions of the Foundation and rate significantly lower than other stakeholders for the favorability of their impression of the Foundation, CHF's understanding of key issues, the extent to which the Foundation has improved how healthcare is practiced and delivered, and CHF's effect on public policy. Central New York stakeholders also indicated different patterns of engagement with the Foundation – they are significantly less likely to receive information about the Foundation's current goals and strategy through in-person contact with the Foundation. One stakeholder comments that the Foundation "pays much less attention to central New York," while another describes a "lack of well established staff in the Syracuse area" as a key weakness of the Foundation.
- When comparing only western New York stakeholders to those in central New York, stakeholders whose organizations are located within western New York indicate more positive perceptions of the Foundation. Specifically, they rate higher than central New York stakeholders for the favorability of their impression of the Foundation, CHF's understanding of key issues, their understanding of CHF's goals, the extent to which the Foundation has improved how healthcare is practiced and delivered, CHF's upholding its commitment to keep "people" at the center of its work, and the Foundation's effect on public policy.
  - *Do these differences in stakeholder experience across geographic location surprise the Foundation?*
  - *Does the Foundation engage in different stakeholder strategies within each of these areas? If so, what steps can CHF take to ensure consistency in its approach?*

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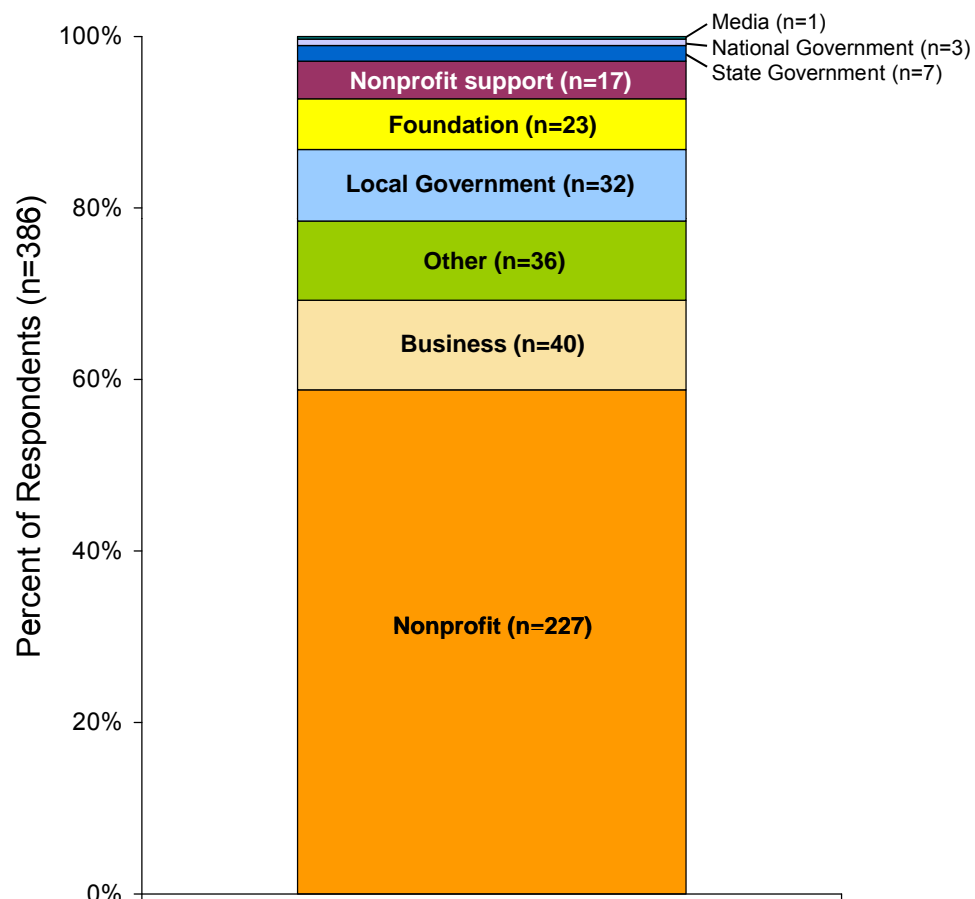
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# Differences By Stakeholder Type

CHF stakeholders were grouped by organization type.

*Which of the following best describes your organization or institution?*



## CHF Analysis – Variation by Stakeholder Type

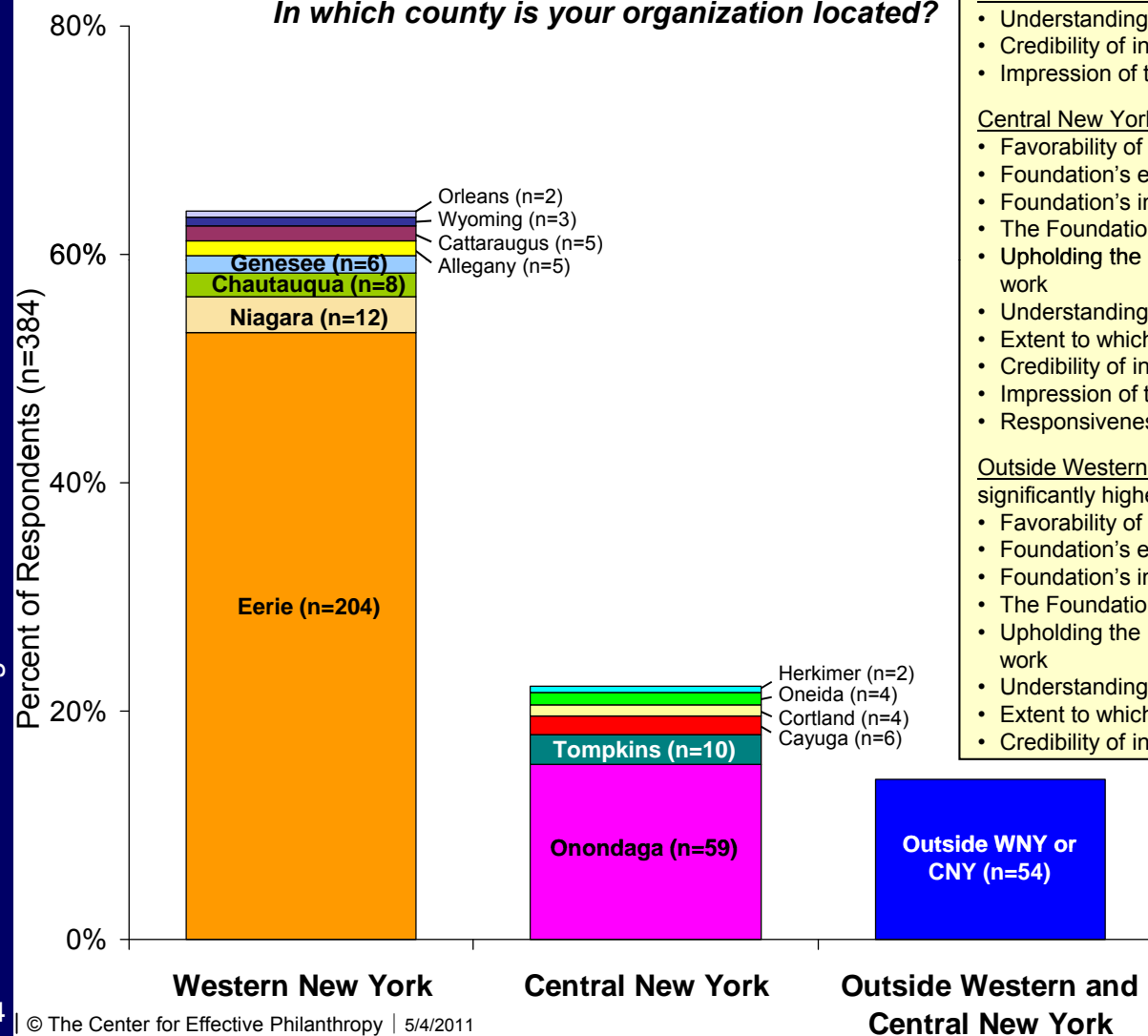
Stakeholders who indicate their organization or institution is a foundation rate CHF higher on:

- Favorability of impression of the Foundation
- The Foundation's understanding of key issues
- Upholding the Foundation's commitment to keep people at the center of its work
- Extent to which the Foundation is innovative in its work
- Credibility of information provided by the Foundation
- Impression of Foundation staff
- Responsiveness of Foundation staff

# Differences By Stakeholder Organization Location

CHF stakeholders were grouped by the location of their organization.

*In which county is your organization located?*



## CHF Analysis – Variation by Organization Location

Stakeholders rate the Foundation differently based on the county in which their organization is located.

Western New York stakeholders rate the Foundation significantly higher on:

- Understanding of the Foundation's goals
- Credibility of information provided by the Foundation
- Impression of the Foundation's Board

Central New York stakeholders rate the Foundation significantly lower on:

- Favorability of impression of the Foundation
- Foundation's effect on public policy
- Foundation's impact on healthcare
- The Foundation's understanding of key issues
- Upholding the Foundation's commitment to keep people at the center of its work
- Understanding of the Foundation's goals
- Extent to which the Foundation is innovative in its work
- Credibility of information provided by the Foundation
- Impression of the Board
- Responsiveness of Foundation staff

Outside Western and Central New York stakeholders rate the Foundation significantly higher on:

- Favorability of impression of the Foundation
- Foundation's effect on public policy
- Foundation's impact on healthcare
- The Foundation's understanding of key issues
- Upholding the Foundation's commitment to keep people at the center of its work
- Understanding of the Foundation's strategy
- Extent to which the Foundation is innovative in its work
- Credibility of information provided by the Foundation

# Stakeholder Demographics (1)

Measure	CHF	Full Dataset Median
<b>Past Funding Recipient</b>		
Yes	54%	53%
No	43%	43%
Don't know	4%	5%
<b>Previously Declined Funding Applicant</b>		
Yes	16%	23%
No	74%	64%
Don't know	10%	13%
<b>Knowledge of the Foundation</b>		
Less than one year	3%	3%
1 year or more but less than 3 years	18%	14%
3 years or more but less than 5 years	31%	15%
More than 5 years	47%	67%

## CHF Analysis – Variation by Receipt of Past Funding

Stakeholders who report that they have previously received funding from the Foundation rate significantly higher than other stakeholders on:

- Favorability of their impression of the Foundation
- Extent to which the Foundation has advanced the state of knowledge
- Foundation's effect on public policy
- Foundation's impact on healthcare
- Upholding the Foundation's commitment to keep people at the center of its work
- Extent to which the Foundation is innovative in its work
- Credibility of information provided by the Foundation

## CHF Analysis – Variation by Declination of Past Funding

Stakeholders who report that they have previously been declined funding from the Foundation rate significantly lower than other stakeholders on:

- Favorability of impression of the Foundation
- The Foundation's understanding of key issues
- Upholding the Foundation's commitment to keep people at the center of its work
- Extent to which the Foundation is innovative in its work
- Credibility of information provided by the Foundation
- Impression of Foundation staff

# Stakeholder Demographics (2)

Measure	CHF	Full Dataset Median
<b>Organizational Scope</b>		
Local	61%	31%
State-wide	19%	32%
Regional	8%	11%
National	13%	26%
<b>Race/Ethnicity</b>		
African-American/Black	6%	8%
American Indian or Alaska Native	0%	<1%
Asian (including the Indian subcontinent)	1%	1%
Caucasian/White	87%	83%
Hispanic/Latino	1%	4%
Multi-racial	<1%	1%
Pacific Islander	<1%	<1%
Other	1%	1%
Prefer not to say	5%	3%
<b>Gender</b>		
Female	67%	51%
Male	29%	47%
Other	0%	<1%
Prefer not to say	4%	2%

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# About the Center for Effective Philanthropy (CEP)

## Mission

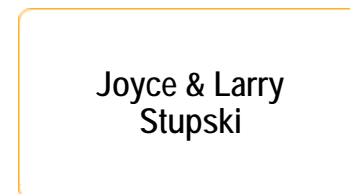
**To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness and impact.**

## Vision

**We seek a world in which pressing social needs are more effectively addressed. We believe improved effectiveness of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.**

# CEP Funders

CEP is funded through a combination of foundation grants and revenue earned from management tools and seminars. Funders providing support for CEP's work include:



# CEP Research

CEP's research and creation of comparative data sets leads to the development of assessment tools, publications serving the philanthropic funder field, and programming. CEP's research initiatives focus on several subjects, including:

Research Focus	CEP Publication
Performance Assessment	<i>Toward a Common Language: Listening to Foundation CEOs and Other Experts Talk About Performance Measurement in Philanthropy</i> (2002)
	<i>Indicators of Effectiveness: Understanding and Improving Foundation Performance</i> (2002)
	<i>Assessing Performance at the Robert Wood Johnson Foundation: A Case Study</i> (2004)
Funder Strategy	<i>Beyond the Rhetoric: Foundation Strategy</i> (2007)
	<i>Lessons from the Field: Becoming Strategic: The Evolution of the Flinn Foundation</i> (2009)
	<i>The Essentials of Foundation Strategy</i> (2009)
	<i>Lessons from the Field: Striving for Transformative Change at the Stuart Foundation</i> (2009)
Funder Governance	<i>Foundation Governance: The CEO Viewpoint</i> (2004)
	<i>Beyond Compliance: The Trustee Viewpoint on Effective Foundation Governance</i> (2005)
Funder-Grantee Relationships	<i>Listening to Grantees: What Nonprofits Value in Their Foundation Funders</i> (2004)
	<i>Foundation Communications: The Grantee Perspective</i> (2006)
	<i>In Search of Impact: Practices and Perceptions in Foundations' Provision of Program and Operating Grants to Nonprofits</i> (2006)
	<i>Luck of the Draw</i> (2007)
	<i>Working with Grantees: The Keys to Success and Five Program Officers Who Exemplify Them</i> (2010)
Managing Operations	<i>Lessons from the Field: Improving the Experience at the David and Lucile Packard Foundation</i> (2008)
	<i>Lessons from the Field: Aiming for Excellence at the Wallace Foundation</i> (2008)
Non-Monetary Assistance	<i>More than Money: Making a Difference with Assistance Beyond the Grant</i> (2008)

# CEP Assessment Tools

CEP provides philanthropic funder leaders with assessment tools – utilizing comparative data – that inform performance assessment:

- **Grantee Perception Report® (GPR):** provides CEOs, boards, and staff with comparative data on grantee perceptions of funder performance on a variety of dimensions
- **Applicant Perception Report (APR):** a companion to the GPR that provides comparative data from surveys of declined grant applicants
- **Comparative Board Report (CBR):** provides data on board structure and trustee perceptions of board effectiveness on a comparative basis
- **Staff Perception Report (SPR):** explores philanthropic funder staff members' perceptions of funder effectiveness and job satisfaction on a comparative basis
- **Operational Benchmarking Report (OBR):** provides comparative data, relative to a selected peer group of funders, on aspects of philanthropic funder operations – including organization staffing, program officer workload, grant processing times, and administrative costs
- **Stakeholder Assessment Report (STAR):** delivers insight about a funder's effectiveness by surveying stakeholders a funder seeks to influence as part of its strategy
- **Multidimensional Assessment Process (MAP):** provides an integrated assessment of performance, assimilating results and data from all of CEP's assessment tools into Executive Summary, implications, and recommended action steps for greater effectiveness
- **Donor Perception Report (DPR):** creates insight, on a comparative basis, about donors' perceptions of the community foundations to and through which they contribute or establish funds
- **Beneficiary Perception Report (BPR):** informs the work of funders and grantees by providing comparative feedback from those whose lives funders seek to improve – the ultimate beneficiaries of funders' philanthropic efforts

## Contact Information

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