

Stakeholder Assessment Report

PREPARED FOR

The Health Foundation for Western and Central New York

October 2015



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THE CENTER FOR
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In May and June of 2015, The Center for Effective Philanthropy (CEP) conducted a survey of HFWCNY's stakeholders. The memo below outlines the key findings from HFWCNY's stakeholder survey, as well as the methodology used to collect this feedback.

The Stakeholder Assessment Report is a management tool that provides insight about stakeholder perceptions of foundations. Assessing funder performance is challenging, and a range of data sources is required. Stakeholder feedback provides one set of perspectives that can be useful, and should be interpreted in light of the Foundation's particular goals and strategy. HFWCNY should place emphasis on the areas covered according to your specific priorities. Low ratings in an area that is not core to your strategy may not be concerning.

Improved Impressions of the Foundation and Increasingly Positive Perceptions of Impact

Overall, 2015 stakeholder ratings have improved since 2010, and are either similar to or more positive than other funders' stakeholder feedback.

- Stakeholders report significantly more favorable impressions of the Foundation than in 2010, now similar to the typical funder.
- For the extent to which the Foundation has affected public policy, and the extent to which the Foundation has advanced the state of knowledge, stakeholders rate HFWCNY significantly more positively than in 2010, bringing the foundation in line with the typical funder.
- Further, stakeholders strongly agree that the Foundation has upheld its commitment to keep people at the center of its work (average rating of 6.1 on 1-7 scale).
- Stakeholders rate their impressions of the Foundation's understanding of key issues significantly more positively than in the past and more positively than stakeholders at the typical funder.
- When asked to describe the Foundation in one word, the most frequently used words are innovative, community and collaborative.
- **Recommendation:** *To maintain these increasingly positive perceptions among its stakeholders, the Foundation should explore, identify, and codify the practices behind these improvements.*

Stronger Understanding of *and* Agreement with the Foundation's Goals and Strategy

- The greatest proportion of stakeholders indicate that in-person contact (46%) and information received directly from the Foundation (30%) are the primary ways they learn about the Foundation's goals and strategy. More stakeholders learn about the Foundation primarily through its website (14%) than in 2010 (8%) and in comparison to the typical funder (6%).
 - Ratings from stakeholders reporting learning about the Foundation's goals and strategy via in-person contact and/or receiving information directly from the Foundation trend up across most measures of the survey, and are significantly more positive for credibility of the information received and overall stakeholder impressions of the Foundation.
- Stakeholders report a significant improvement over 2010 for how clearly they understand both the Foundation's current goals *and* the Foundation's current strategy. On both of these measures HFWCNY is rated higher than the typical funder.
 - Stakeholders who say they understand the Foundations goals and/or strategies "extremely clearly" rate significantly higher on key survey measures.
- When asked to rate how effective the Foundation is at accomplishing each of its three specific goals, stakeholders rate HFWCNY positively but, on average, only moderately (ranging from 5.0-5.2 on a 1-7 scale). The Foundation is rated most positively for its goal that "All vulnerable older adults are able to plan for and maintain a dignified, independent, high-quality life in their community."
- Ninety-six percent of stakeholders report the Foundation has chosen the right goals, an improvement over 2010, and a higher proportion than at the typical funder.
- Stakeholders were asked to rate the efficacy of the Foundation's various approaches for supporting its ability to achieve its goals. Stakeholders rate leadership development, organizational development, and grants as the most effective approaches.

- They also report significantly greater innovation, placing the Foundation above 85% of funders on this measure.
- The second most frequently mentioned strength (n=86) is HFWCNY’s mission and strategic focus. Stakeholders describe the Foundation’s “focused approach,” “commitment to important issues,” and as being “oriented to long-range goals.” They also mention its “ability to convene” and “collaborate” and reference specific programs, particularly The Fellows Action Network. At the same time, though, the Foundation’s mission and strategic focus is also the most frequently mentioned weakness and the most commonly mentioned suggestion for improvement. Stakeholders describing this aspect of the foundation as a weakness frequently reference the Foundation’s “narrow focus” and “limited geographic scope of work.” When raised as a suggestion, stakeholders recommend the Foundation consider the fields and geographies in which it works.
- The second most frequently mentioned weakness of the Foundation and the most frequently mentioned suggestion for improvement relate to the Foundation’s grantmaking. One stakeholder notes that, “At times decisions for funding don't seem to align with true needs within a community/population.” Suggestions focus on grantmaking characteristics, specifically grant size, such as requests to “fund less projects at a time, and add resources to each project.”
- **Recommendations:**
 - *In light of more positive perceptions about the Foundation among stakeholders with strong understandings of HFWCNY’s goals and strategies, and stakeholder open-ended suggestions, seek opportunities to be increasingly clear and consistent in communications about what the Foundation does and does not do and why.*
 - *When possible and appropriate, seek more opportunities to share information about the Foundation’s goals and strategy with stakeholders in-person or directly (email or print).*

Use & Helpfulness of Foundation Communications Resources

- Stakeholders most frequently use the Foundation’s website and Foundation staff consultation to learn about HFWCNY, with 76% and 74% of stakeholders saying they have used these two communications resources to learn about the Foundation in the past year, respectively.
 - Foundation staff consultation and Foundation-sponsored events/workshops are the two most helpful communication resources. However, fewer stakeholders (62%) have used Foundation-sponsored event/workshop.
 - Stakeholders whose organizations work in both Central & Western NY are more frequently using Foundation communication resources.
 - Stakeholders who use Foundation staff consultation to learn about HFWCNY rate significantly higher on a number of measures, including overall impressions of the Foundation and the extent to which the Foundation has advanced the state of knowledge in comparison to stakeholders who did not use staff consultation.
- To support their own organization’s work, two-thirds of stakeholders use Foundation staff consultation, which is also rated the most helpful of the Foundation’s resources in supporting stakeholders’ work. More than half of HFWCNY stakeholders use the Foundation’s website, publications/reports and Foundation-sponsored events/workshops to support their work.
- The Foundation is rated more highly than in 2010 and more highly than the typical funder for the credibility of the information it provides to stakeholders.
- Seventy-three percent of HFWCNY stakeholders use the Foundation’s resources once every few months or more often, similar to 2010 (70%) and the typical funder (75%). However, fewer

HFWCNY stakeholders are using resources a few times a month or more (16%), compared to the typical funder (23%).

- **Recommendation:** *Explore whether patterns of stakeholder resource use and perceptions of helpfulness align with Foundation goals for communications resources, and consider offering more of the resources that are most valued. HFWCNY might also further calibrate resources to different stakeholder group interests (e.g., organization type, region) based on stakeholder responses.*

Increasingly Positive Interactions with the Foundation

- Stakeholder perceptions of Foundation staff and board are trending upwards over 2010.
- Eighty-one percent of stakeholders report interacting with a staff member (51%) a board member (3%), or both a staff and board member (27%) within the last year.
 - Stakeholders reporting interaction with staff and/or board rate the Foundation more positively on many survey measures than stakeholders that did not interact with board or staff.
- Eighty-one percent of HFWCNY stakeholders report having worked directly with the Foundation in the past (e.g., received funding from or partnered with HFWCNY).
 - When asked a series of positively worded statements about their experience with HFWCNY, these stakeholders agree most strongly that “There was significant value in my collaborations with the Foundation” and “HFWCNY is easy to work with.”
 - Ratings trend higher on most survey measures for stakeholders who have partnered with or received funding from the Foundation compared to other stakeholders. Additionally, the 55% of stakeholders who received funding from the Foundation in the past rate significantly higher on most measures in the survey than other stakeholders.
- Stakeholders reporting initiating contact with the Foundation over the past year (59%) tend to rate the Foundation’s responsiveness and accessibility more positively than 2010, placing the Foundation in line with the typical funder on both measures.
 - Ratings trend higher on most measures in the survey for stakeholders that report initiating contact with the Foundation.
 - Stakeholders that perceive Foundation staff as extremely responsiveness (rating a 7) and/or very accessible (rating a 7) rate the Foundation significantly higher on many survey measures.
- The most frequently mentioned strength (n=91), is HFWCNY’s leadership/staff. Stakeholders commonly reference staff commitment and knowledge. The 37 stakeholders who identify leadership/staff as a weakness commonly reference too few staff, staff turnover, and “lack of staff capacity to cover entire geography.” In suggestions relating to this theme, stakeholders recommend the Foundation add staff.
- **Recommendation:** *While taking into account the cost-benefit considerations of deeper stakeholder engagement, HFWCNY should determine whether it can be more responsive and accessible to stakeholders.*

Summary of Recommendations

Based on The Health Foundation for Western and Central New York's stakeholder feedback, CEP recommends the following:

- Explore, identify, and codify the practices behind improved stakeholder impressions of the Foundation and its impact.
- Provide increasingly clear and consistent communications about what the Foundation does and does not do and why.
- When possible and appropriate, seek more opportunities to share information about the Foundation's goals and strategy with stakeholders in-person or directly (email or print).
- Explore whether patterns of stakeholder resource use and perceptions of helpfulness align with Foundation goals for communications resources, consider offering more of the most-highly valued resources, and further calibrate resources to different stakeholder group interests.
- While taking into account the cost-benefit considerations of deeper stakeholder engagement, consider whether HFWCNY can be more responsive and accessible to stakeholders.

Methodology

- The Center for Effective Philanthropy (CEP) surveyed 1087 stakeholders of the Health Foundation for Western and Central New York in May and June of 2015. CEP received 365 completed responses, for a 34 percent response rate.
- This is the Foundation's second Stakeholder Survey; the first was conducted in 2010.

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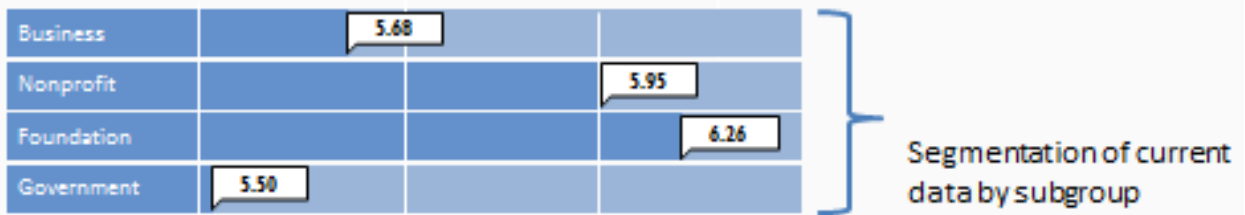
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SEGMENTATION DATA



MISSING DATA

Selected stakeholder ratings are not displayed in this report due to changes in the survey instrument, or when a question received fewer than five 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

EXECUTIVE SUMMARY

» **For most key survey measures, HFWCNY has significantly improved over 2010.**

- » The Foundation is rated significantly higher than in 2010 on the following measures:
 - » "How favorable is your impression of the Foundation?"
 - » "In the areas with which you are familiar, to what extent has the Foundation affected public policy?"
 - » "In the areas with which you are familiar, to what extent has the Foundation advanced the state of knowledge?"
 - » "How would you characterize the Foundation's understanding of key issues?"
 - » "To what extent is the Foundation innovative in the work with which you are familiar?"
 - » "How clearly do you understand the Foundation's current goals?"
 - » "How clearly do you understand the Foundation's current strategy?"
 - » "How credible would you consider information you received from the Foundation?"

» **The Foundation is rated similarly to or more positive than the typical funder in CEP's comparative dataset for most measures in the survey.**

» **There is some variation in ratings by subgroup:**

- » **Region of Organization's Work:** Organizations which do not work in Western or Central NY rate the Foundation significantly higher for the extent to which it is advancing the state of knowledge their areas but are significantly less likely to say that the Foundation has chosen the right goals.
- » **Organization Type:** There are no significant differences when segmenting stakeholder responses by organization type.
- » **Scope of Organization's Work:** Stakeholders whose organizations have a national scope rate their understanding of the Foundation's goals significantly higher than those who have a local scope.
- » **Length of Knowledge about the Foundation:** There are no significant differences when segmenting stakeholder responses by how long they have known about the Foundation.
- » **Responsiveness:** Stakeholders who rate Foundation staff as extremely responsive - a 7 - rate significantly higher on most key measures in the survey.
- » **Familiarity:** Stakeholders who rate Foundation staff as very accessible - a 7 - rate significantly higher on most key measures in the survey.

Foundation Descriptors

Stakeholders were asked to provide three words that describe the Foundation today. A total of 297 words were provided by 294 stakeholders of HFWCNY. In the "word cloud" below, the size of each word indicates the frequency with which it was written by stakeholders. The color of each word is stylistic and not indicative of its frequency. Words only appear in the word cloud if they were mentioned by three or more stakeholders.



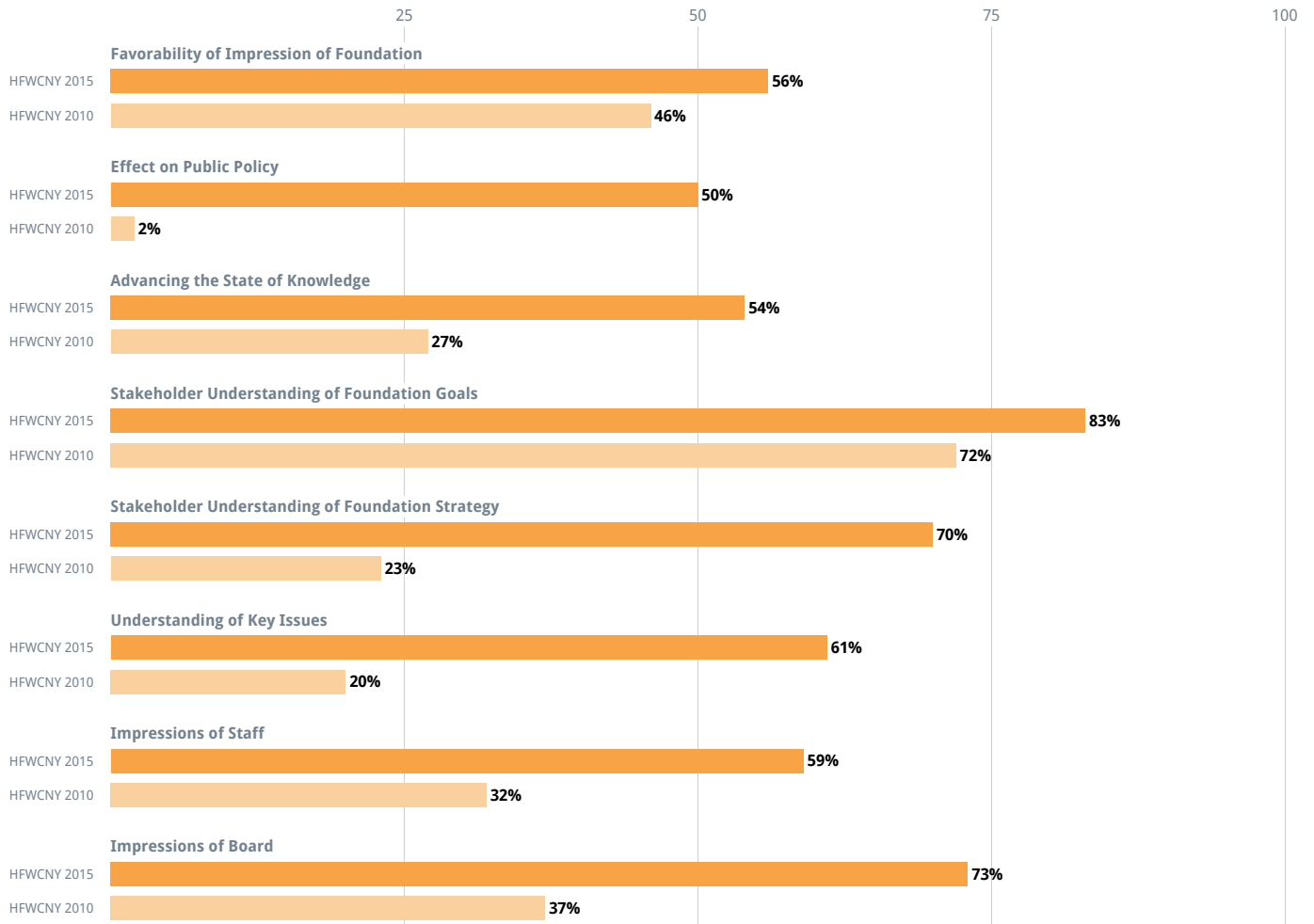
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Ratings Summary

The chart below shows Health Foundation for Western and Central New York's percentile ranking on key areas relative to CEP's overall comparative dataset, where 0% indicates the lowest rated funder, and 100% indicates the highest rated funder. Rankings are also shown for HFWCNY's previous stakeholder data.

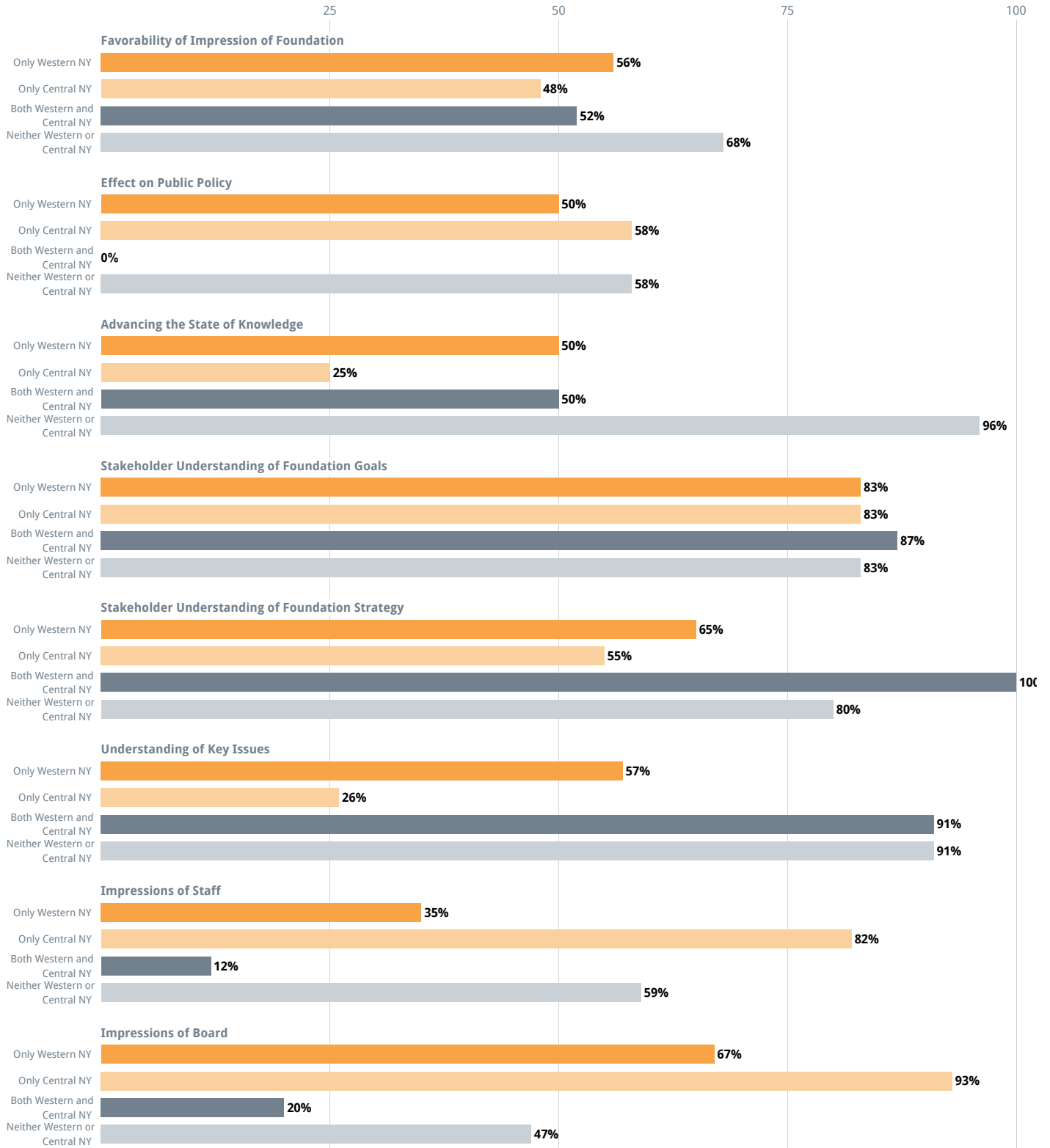
Percentile Rank on Key Measures

■ HFWCNY 2015 ■ HFWCNY 2010



Percentile Rank on Key Measures (by subgroup)

■ Only Western NY
 ■ Only Central NY
 ■ Both Western and Central NY
 ■ Neither Western or Central NY



SURVEY POPULATION

CEP surveyed HFWCNY's stakeholders in June and July of 2015. The target population was selected by HFWCNY. CEP used a confidential survey that was distributed electronically. The details of HFWCNY's survey are as follows:

Survey Period	Number of Stakeholders Surveyed	Number of Responses Received	Survey Response Rate
June and July 2015	1087	365	34%
September and October 2010	790	399	51%

Subgroups

In addition to showing HFWCNY's overall ratings, this report shows ratings segmented by number of subgroups: Region of organization's work, familiarity with the Foundation, stakeholder organization type, geographic scope of stakeholder organization's work, and past funding relationship with the Foundation.

Region of Organization's Work	Number of Responses
Only Western NY	135
Only Central NY	62
Both Western and Central NY	11
Neither Western or Central NY	90

Ogranization Type	Number of Responses
Government	42
Foundation	18
Nonprofit support / intermediary	15
Nonprofit organization	163
For-profit business	31

Scope of Organization's Work	Number of Responses
National	39
Regional (Multi-state)	24
State-wide	40
Local	199

Throughout this report, Health Foundation for Western and Central New York's survey results are compared to CEP's broader dataset of more than 3,000 stakeholders of more than 20 funders. The full list of participating funders is below:

Foundations in the Comparative Set

Aetna Foundation	Health Care Foundation of Greater Kansas City
Alaska Mental Health Trust Authority	Helen Andrus Benedict Foundation
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	Rose Community Foundation
Health Foundation of Western and Central New York	Texas Guaranteed Student Loan Corporation Public Benefit Program
Endowment for Health	The New York State Health Foundation
Flinn Foundation	The Rhode Island Foundation
Gaylord and Dorothy Donnelley Foundation	The SCAN Foundation
The Greater Cincinnati Foundation	The Skillman Foundation

Familiarity with the Foundation

Stakeholders were asked to indicate their familiarity with the Foundation.

Stakeholder Familiarity with the Foundation - Overall	HFWCNY 2015	HFWCNY 2010	Full Dataset
Not familiar	5%	2%	2%
Familiar in name	8%	6%	5%
Familiar	38%	48%	44%
Very familiar	50%	44%	49%

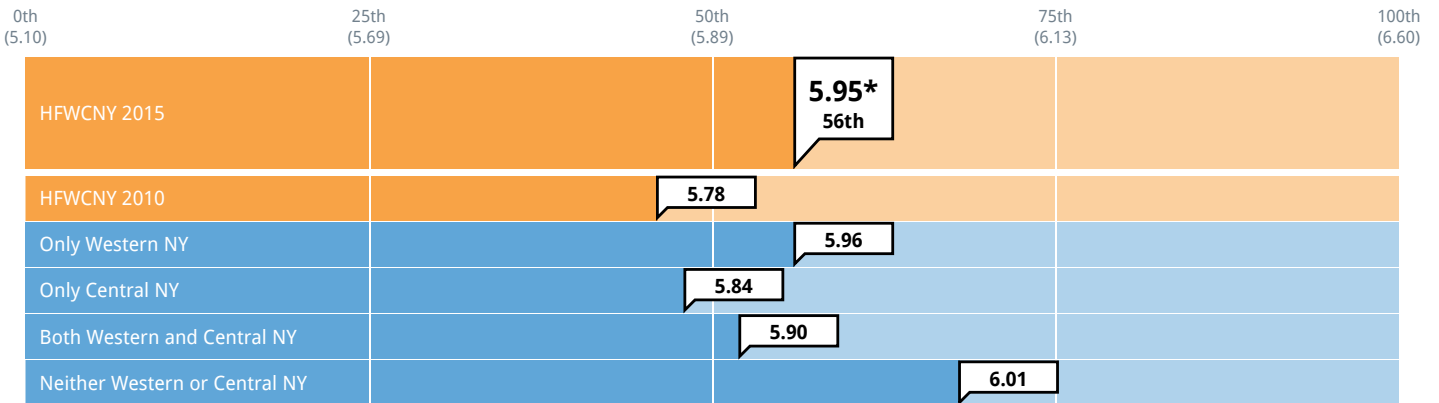
Familiarity with the Foundation - by Subgroup

How familiar are you with the Foundation? (By Subgroup)	Only Western NY	Only Central NY	Both Western and Central NY	Neither Western or Central NY
Not familiar	6%	6%	9%	1%
Familiar in name	8%	5%	N/A	4%
Familiar	39%	34%	9%	38%
Very familiar	47%	55%	82%	57%

OVERALL IMPRESSIONS

“How favorable is your impression of the Foundation?”

1 = Not at all favorable, 7 = Very favorable



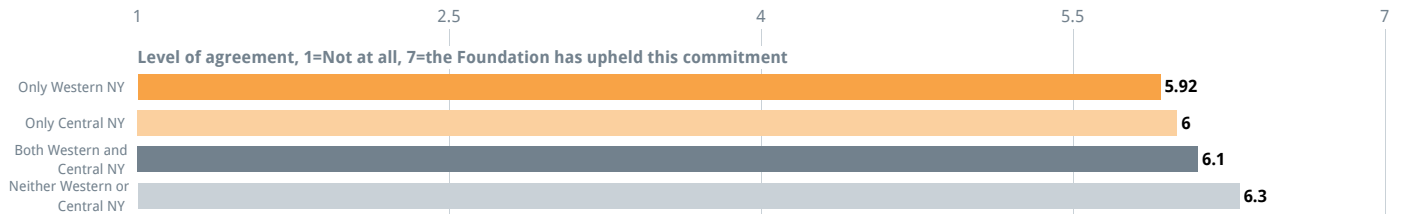
Has the Foundation held to its commitment to keep people at the center of its work?

■ HFWCNY 2015



Has the Foundation held to its commitment to keep people at the center of its work?

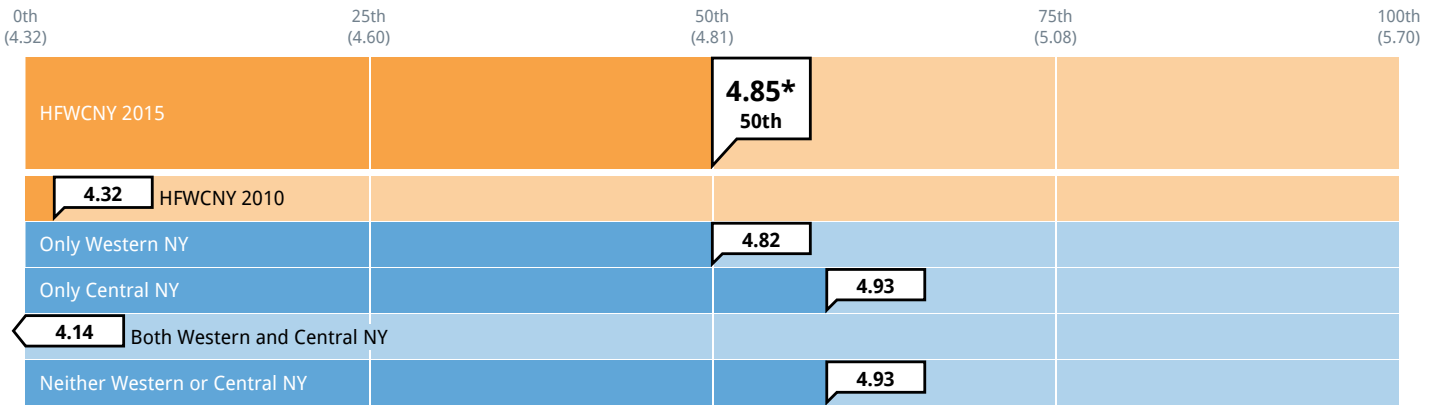
■ Only Western NY ■ Only Central NY ■ Both Western and Central NY ■ Neither Western or Central NY



Foundation's Effect on the Field

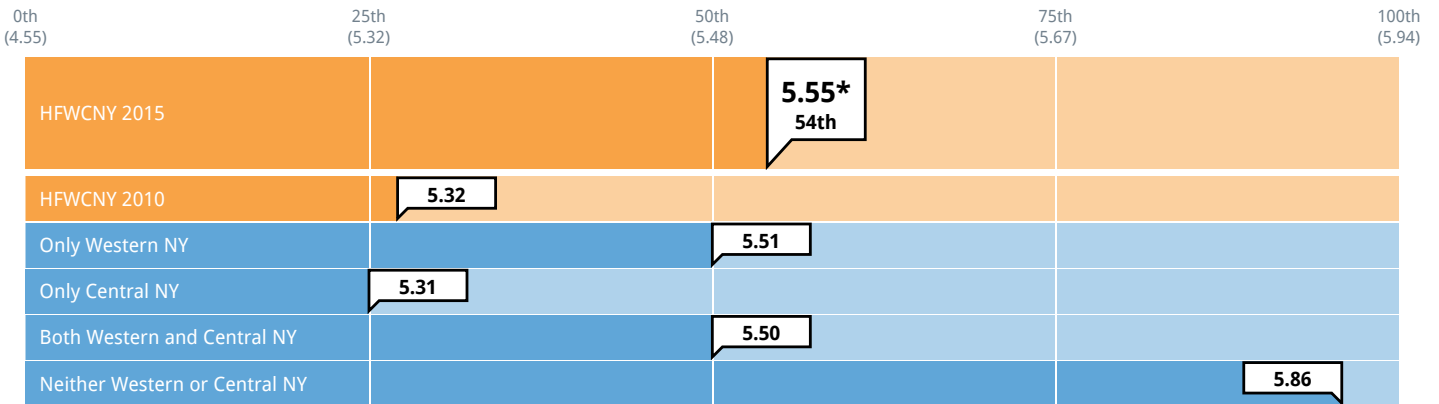
"In the areas with which you are familiar, to what extent has the Foundation affected public policy?"

1 = Not at all, 7 = Major influence on shaping policy



"In the areas with which you are familiar, to what extent has the Foundation advanced the state of knowledge?"

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



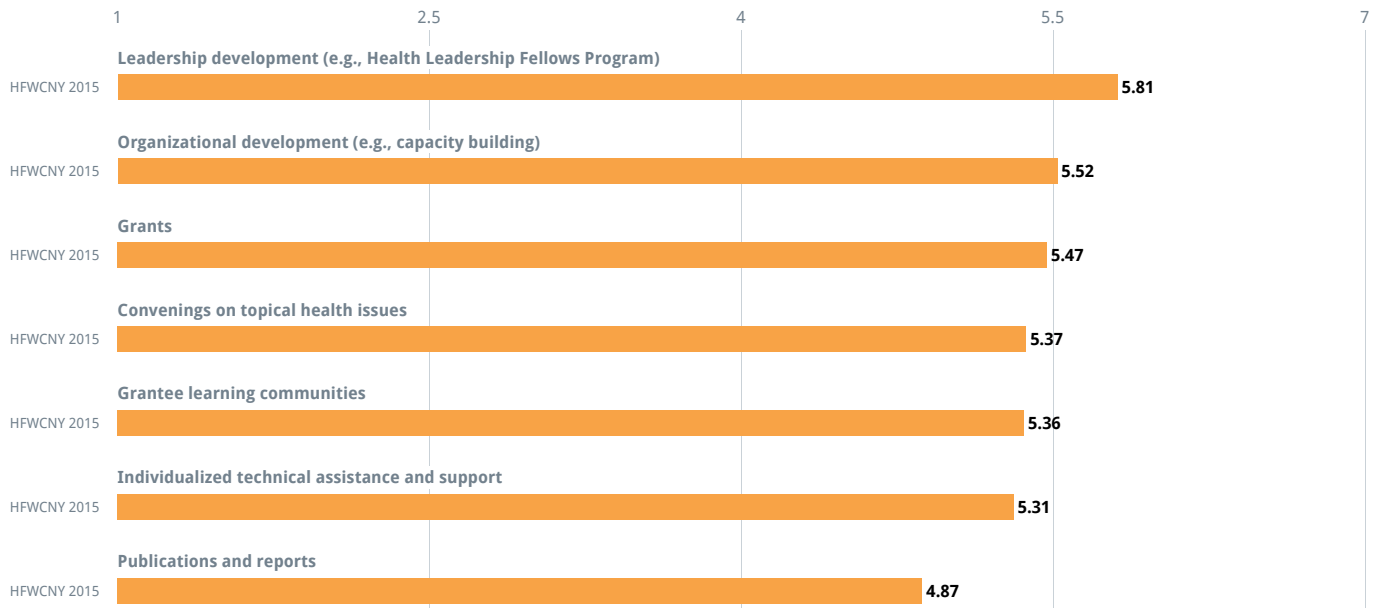
FOUNDATION'S GOALS AND STRATEGIES

In your opinion, has the Foundation chosen the right goals? (Overall)	HFWCNY 2015	HFWCNY 2010	Average Funder
Yes	96%	92%	92%
No	4%	8%	8%

In your opinion, has the Foundation chosen the right goals? (By Subgroup)	Only Western NY	Only Central NY	Both Western and Central NY	Neither Western or Central NY
Yes	97%	98%	100%	91%
No	3%	2%	0%	9%

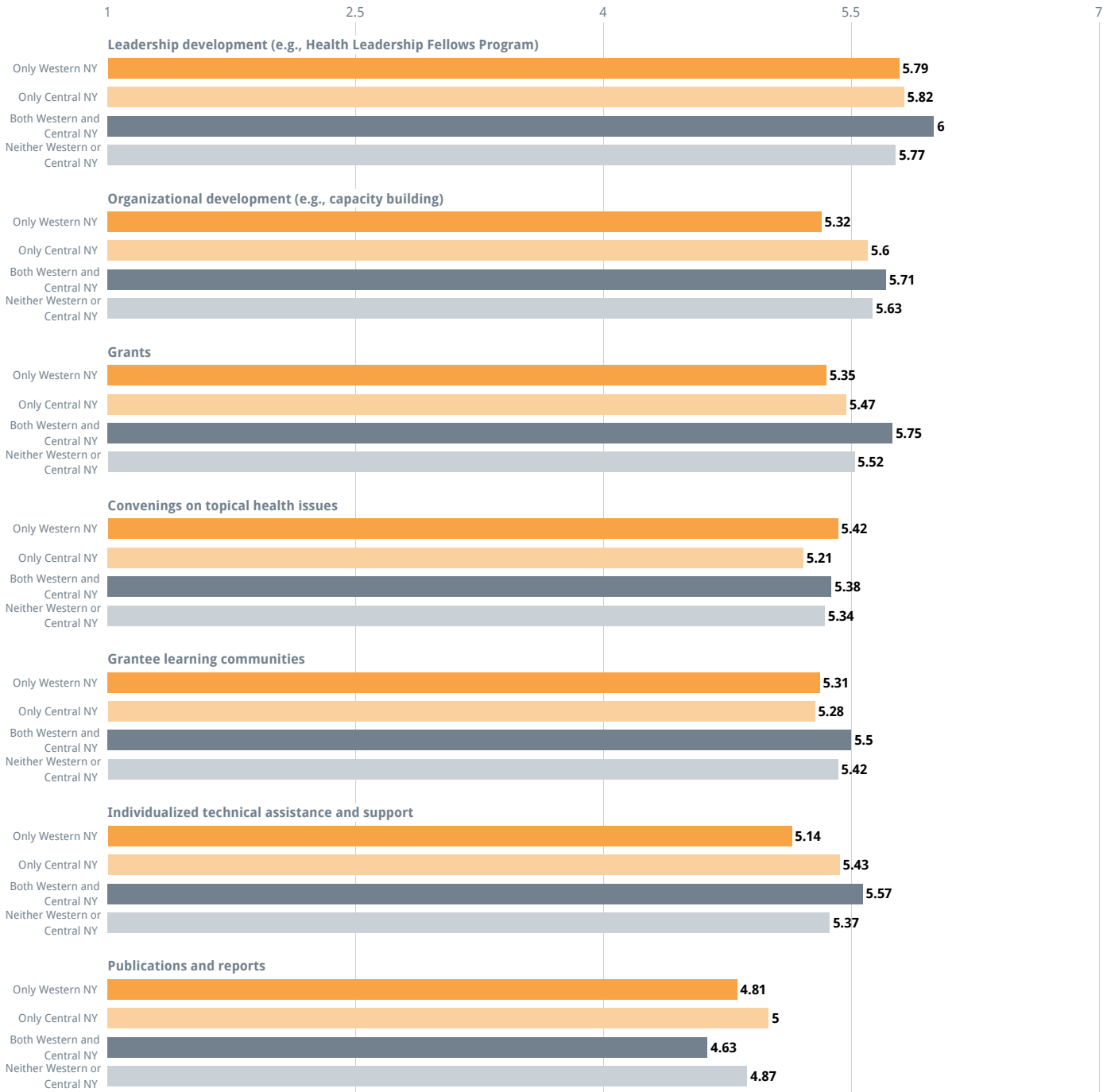
How effective is each of the following in supporting the Foundation's ability to achieve its goals?

■ HFWCNY 2015



How effective is each of the following in supporting the Foundation's ability to achieve its goals?

■ Only Western NY
 ■ Only Central NY
 ■ Both Western and Central NY
 ■ Neither Western or Central NY

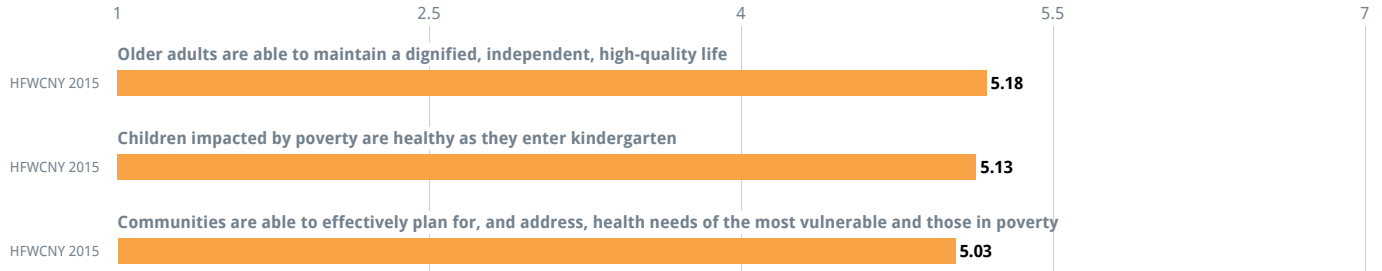


Effectiveness in Accomplishing Specific Goals

In your opinion, how effective is the Foundation at accomplishing each of its specific goals? (1 = Not at all effective, 7 = Very effective)

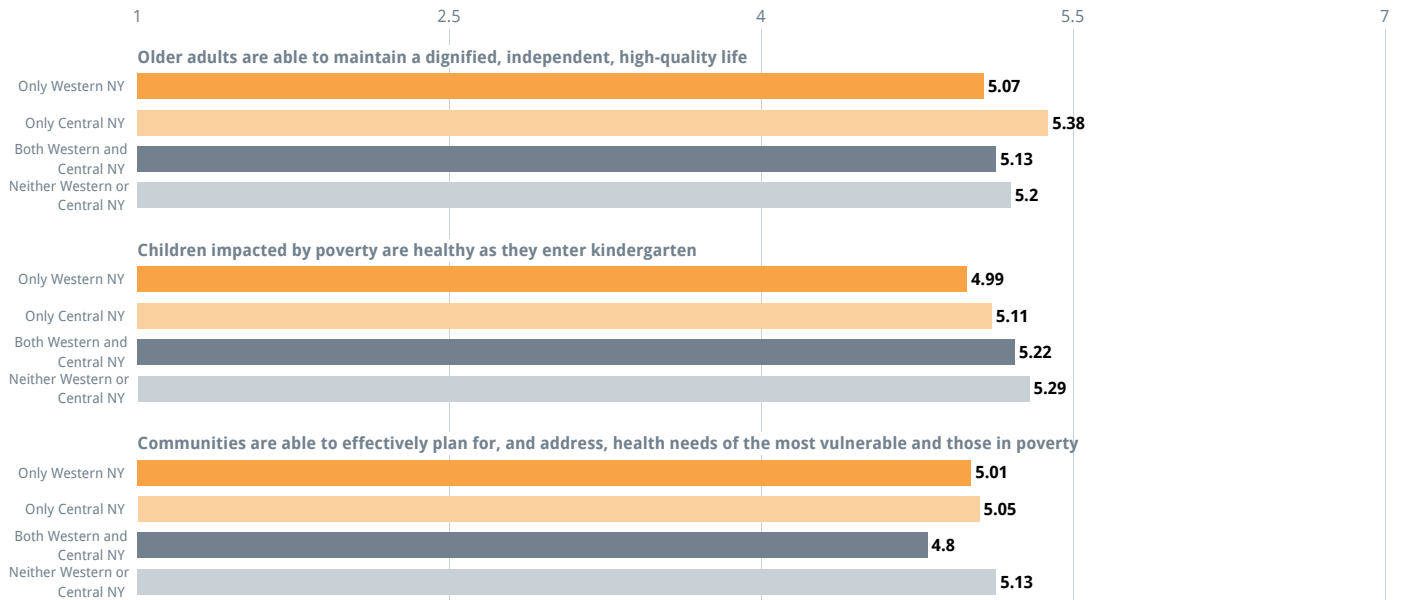
Ratings of Effectiveness - Overall

HFWCNY 2015



Ratings of Effectiveness - By Subgroup

Only Western NY Only Central NY Both Western and Central NY Neither Western or Central NY



Information Sources on Goals and Strategies

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

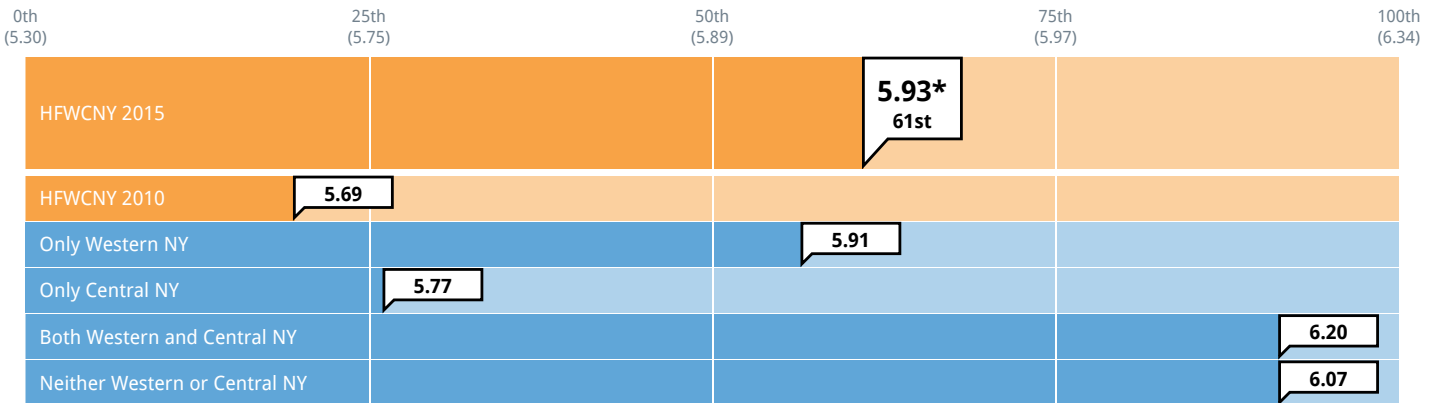
What is the primary information source from which you learn about the Foundation's current goals and strategy? (Overall)	HFWCNY 2015	HFWCNY 2010	Average Funder
In-person contact with the Foundation	46%	43%	47%
Direct information received from the Foundation (email or print)	30%	40%	35%
Foundation website	14%	8%	6%
General media (newspaper, Internet, television)	4%	3%	6%
Other	7%	6%	6%

What is the primary information source from which you learn about the Foundation's current goals and strategy? (By Subgroup)	Only Western NY	Only Central NY	Both Western and Central NY	Neither Western or Central NY
In-person contact with the Foundation	31%	43%	80%	65%
Direct information received from the Foundation (email or print)	40%	24%	10%	18%
Foundation website	15%	19%	N/A	11%
General media (newspaper, Internet, television)	6%	2%	N/A	2%
Other	8%	12%	10%	3%

External Focus of the Foundation

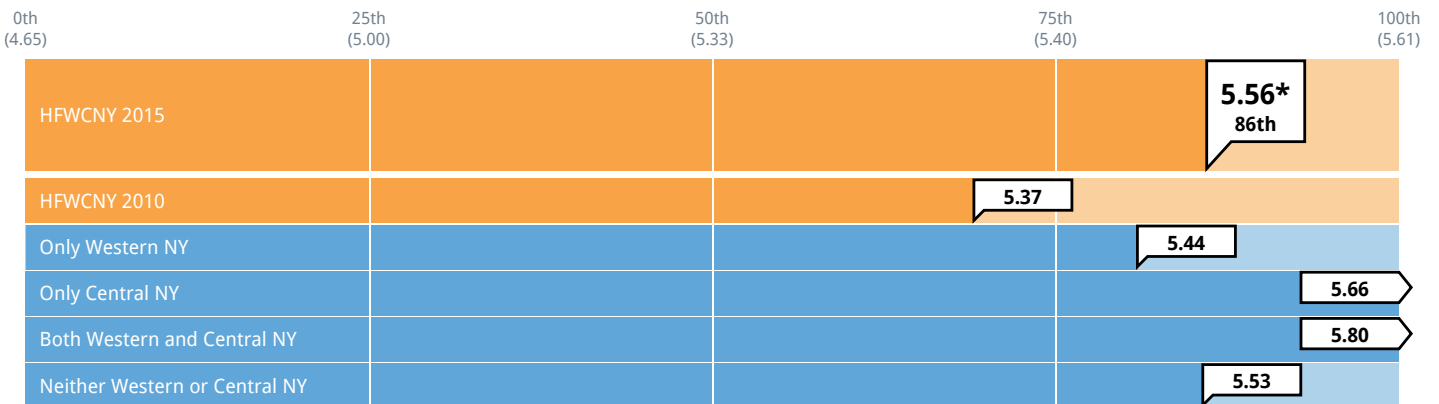
“How would you characterize the Foundation's understanding of key issues?”

1 = Limited understanding, 7 = Thorough understanding



“To what extent is the Foundation innovative in the work with which you are familiar?”

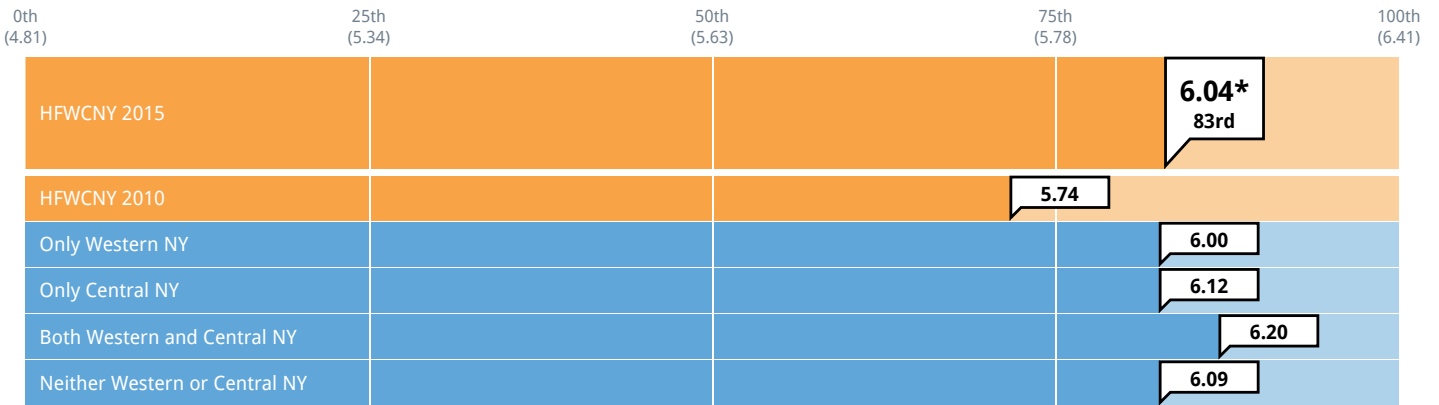
1 = Not at all, 7 = To a great extent



Stakeholders' Understanding of Goals and Strategy

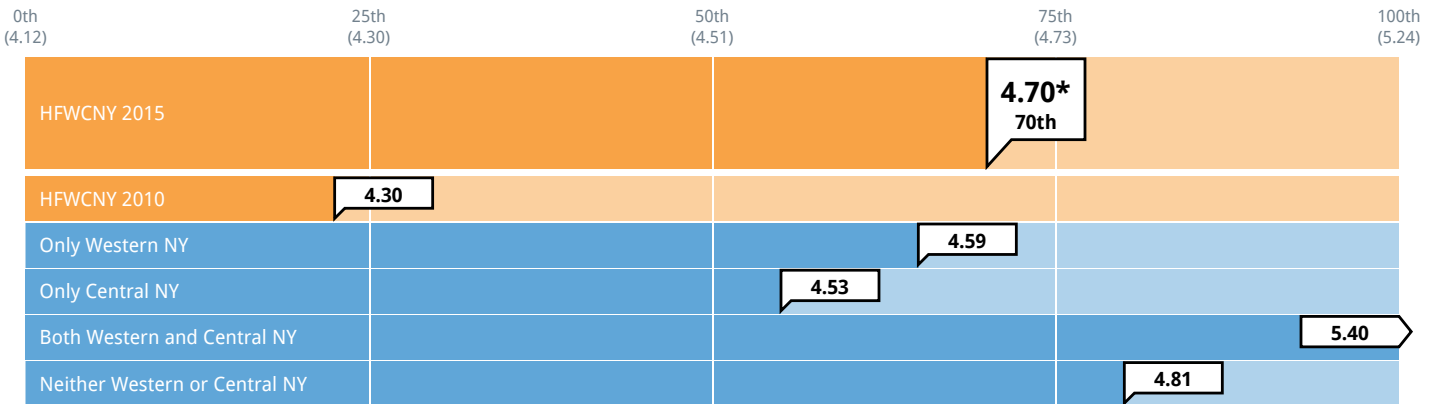
"How clearly do you understand the Foundation's current goals?"

1 = Not at all clearly, 7 = Extremely clearly



"How clearly do you understand the Foundation's current strategy?"

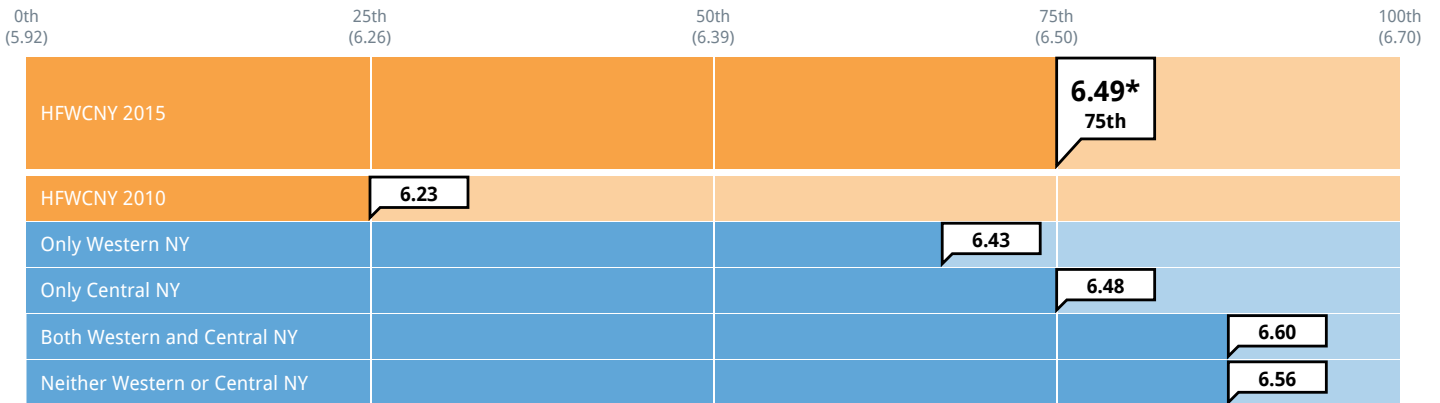
1 = Not at all clearly, 7 = Extremely clearly



STAKEHOLDER COMMUNICATION WITH THE FOUNDATION

“How credible would you consider information you received from the Foundation?”

1 = Not at all credible, 7 = Very credible



Use of Foundation Resources

“How often have you used the Foundation’s resources within the last year?”

How often have you used the Foundation's resources within the last year? (Overall)	HFWCNY 2015	HFWCNY 2010	Average Funder
Weekly or more often	3%	4%	7%
A few times a month	13%	14%	16%
Monthly	15%	13%	16%
Once every few months	42%	39%	36%
Rarely	18%	22%	18%
Never	10%	7%	7%

How often have you used the Foundation's resources within the last year? (By Subgroup)	Only Western NY	Only Central NY	Both Western and Central NY	Neither Western or Central NY
Weekly or more often	4%	N/A	10%	3%
A few times a month	12%	14%	10%	13%
Monthly	17%	10%	50%	11%
Once every few months	41%	53%	10%	39%
Rarely	18%	12%	10%	20%
Never	9%	10%	10%	14%

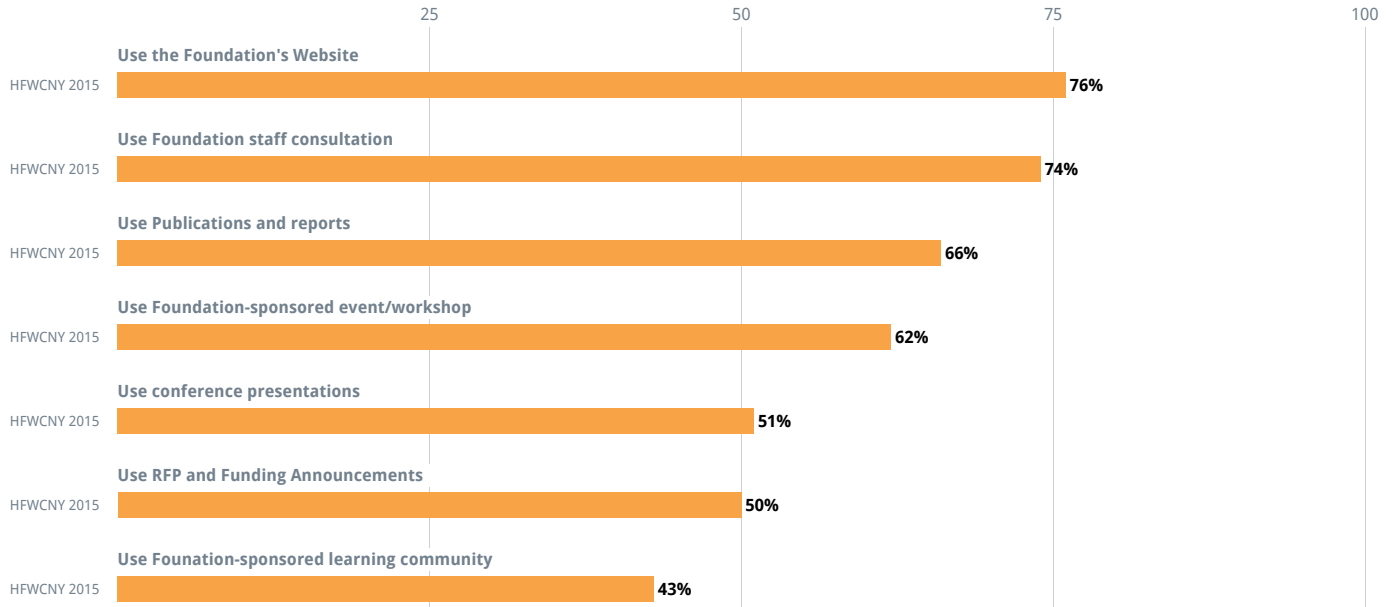
Learning About the Foundation

Stakeholders were asked whether they used each of the following communications resources to learn about HFWCNY and how helpful they found each resource. This chart shows the proportion of stakeholders who have used each resource.

"Please indicate whether you have used any of the following Foundation resources within the last year to learn about the Foundation, and if so how helpful was each."

Usage of Communication Resources - Overall

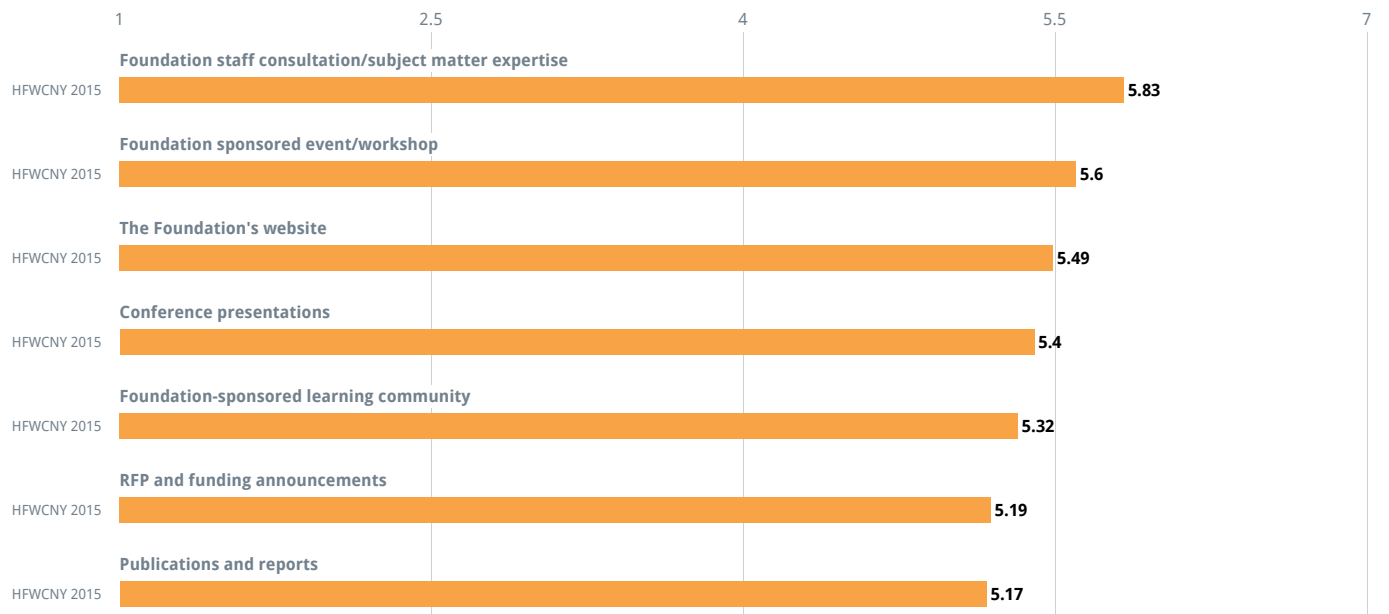
■ HFWCNY 2015



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

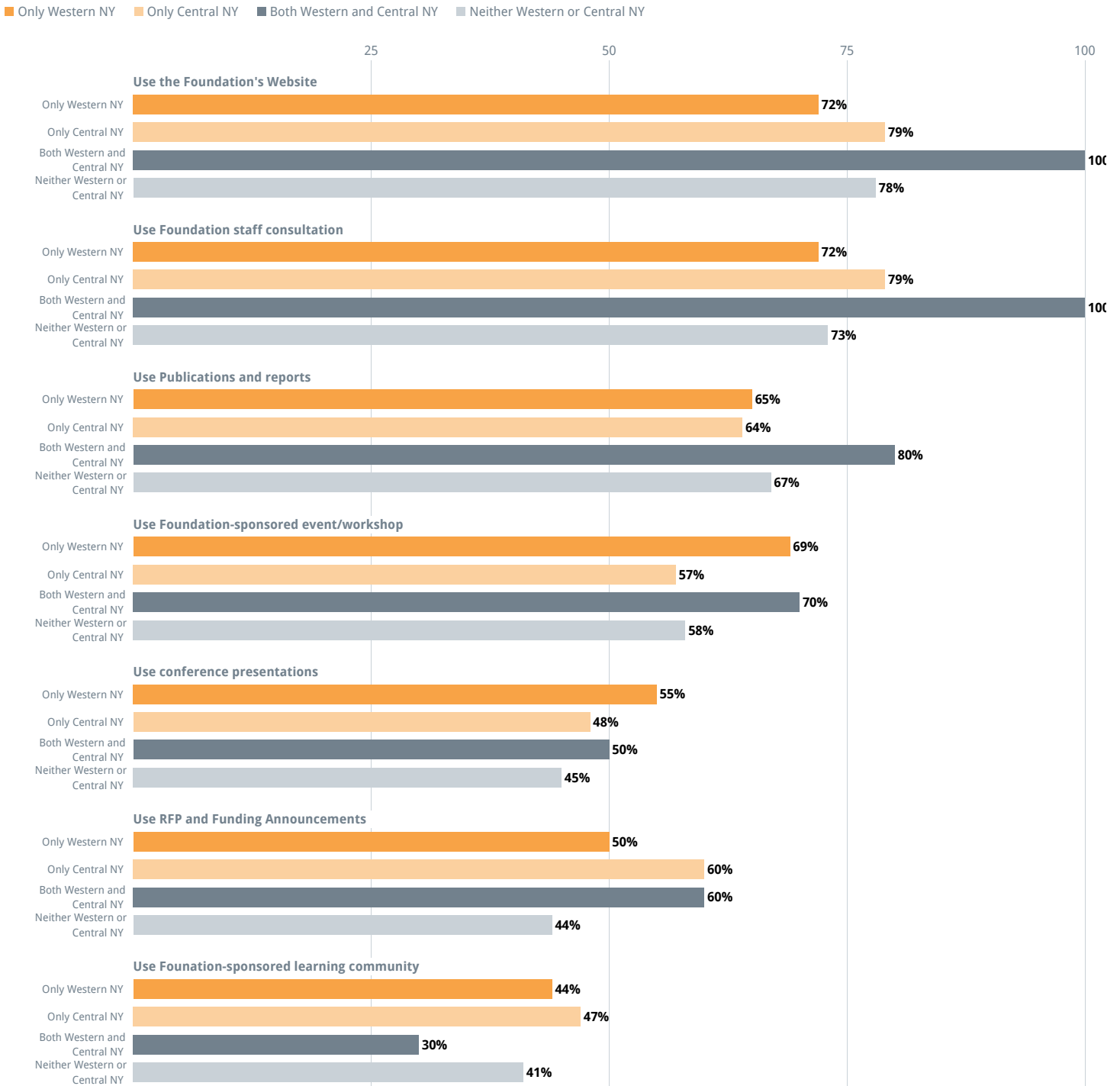
■ HFWCNY 2015



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

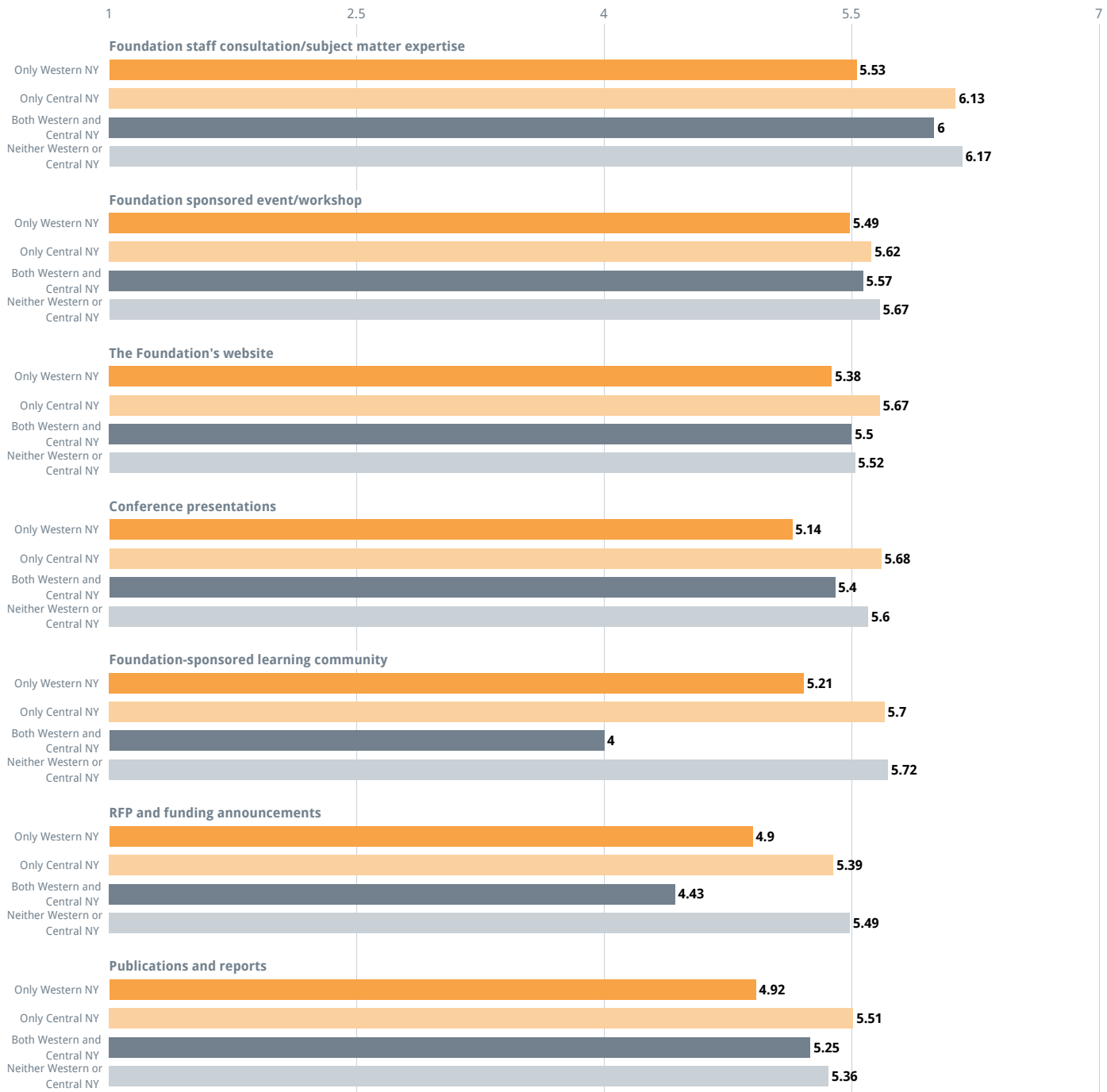
“Please indicate whether you have used any of the following Foundation resources within the last year to learn about the Foundation, and if so how helpful was each.”

Usage of Communication Resources - By Subgroup



Helpfulness of Communication Resources - By Subgroup

■ Only Western NY
 ■ Only Central NY
 ■ Both Western and Central NY
 ■ Neither Western or Central NY



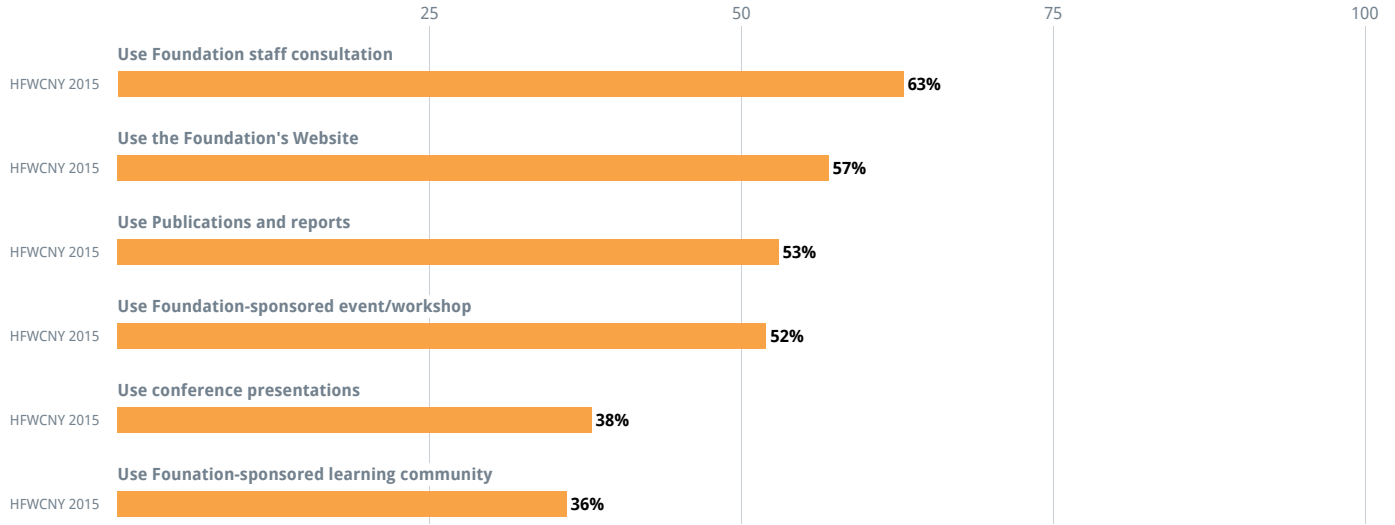
Supporting Your Organization's Work

Stakeholders were asked whether they used each of the following communications resources to support their organizations' work and how helpful they found each resource. This chart shows the proportion of stakeholders who have used each resource.

"Please indicate whether you have used any of the following Foundation resources within the last year to support your organization's work, and if so how helpful was each."

Usage of Communication Resources - Overall

■ HFWCNY 2015



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

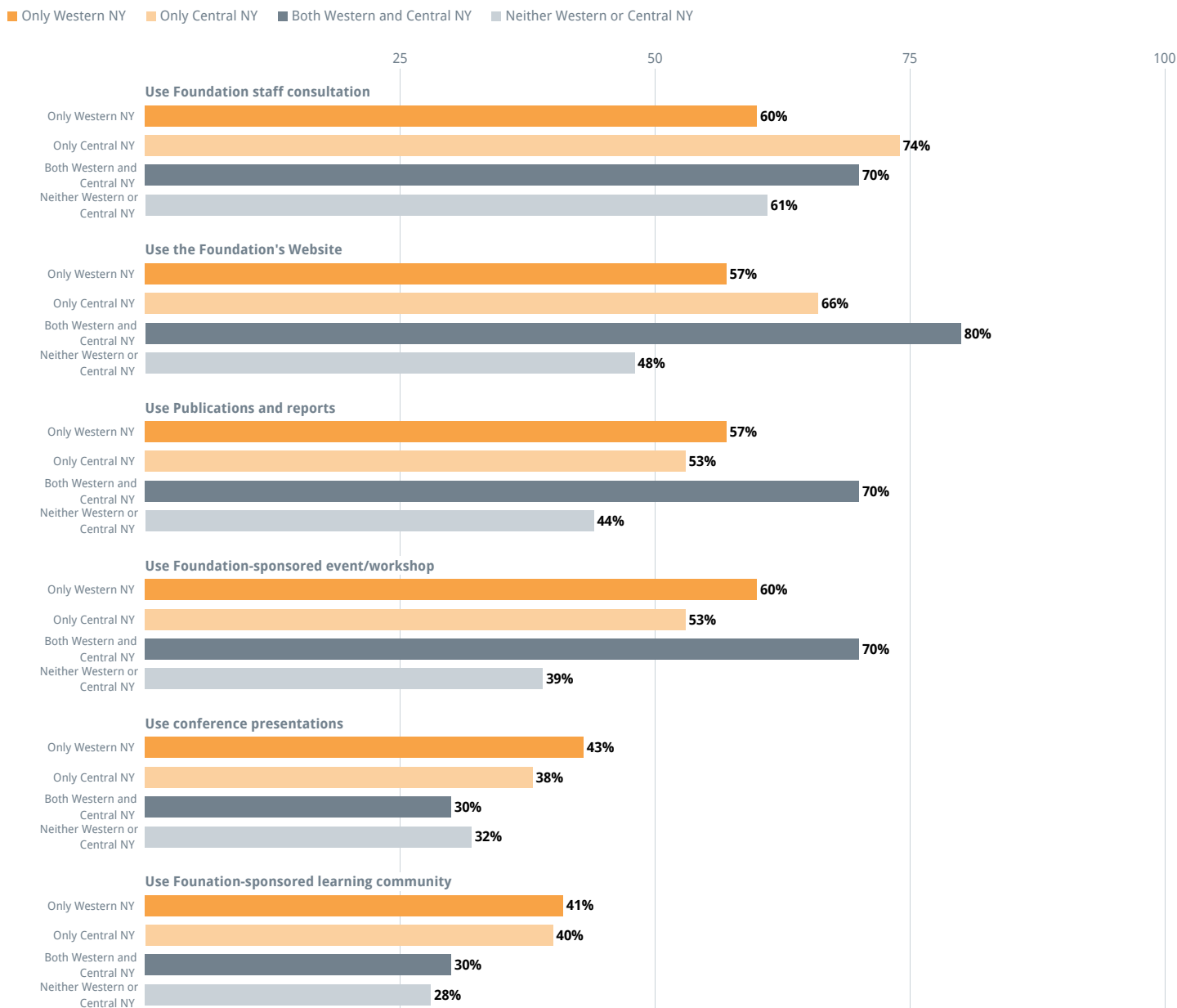
■ HFWCNY 2015



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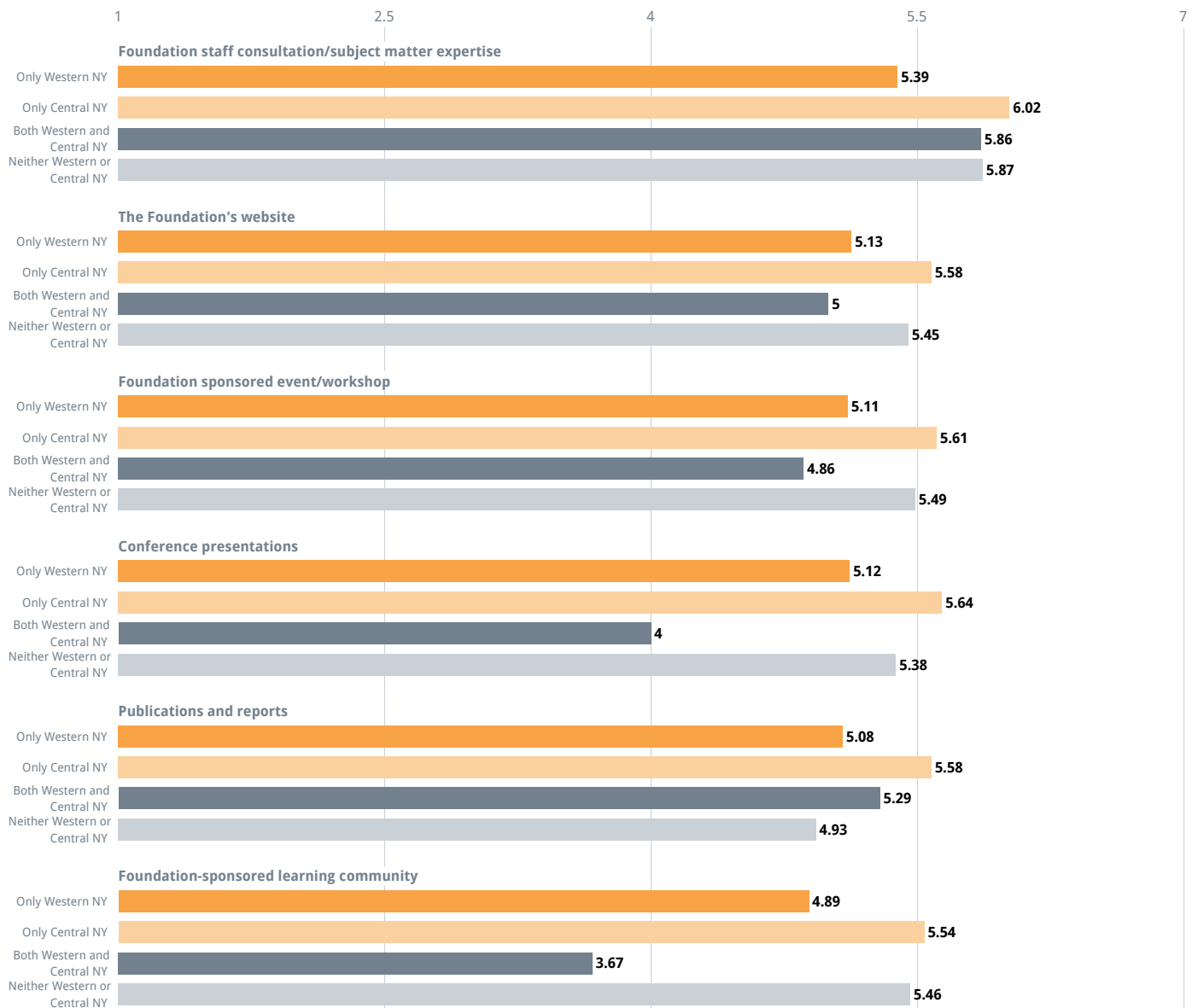
“Please indicate whether you have used any of the following Foundation resources within the last year to support your organization’s work, and if so how helpful was each.”

Usage of Communication Resources - By Subgroup



Helpfulness of Communication Resources - By Subgroup

■ Only Western NY
 ■ Only Central NY
 ■ Both Western and Central NY
 ■ Neither Western or Central NY



STAKEHOLDER INTERACTIONS WITH THE FOUNDATION

“Have you interacted with Foundation staff or a member of its board within the last year?”

Have you interacted with Foundation staff or a member of its Board within the last year? (Overall)	HFWCNY 2015	HFWCNY 2010	Average Funder
Yes, a staff member	51%	59%	50%
Yes, a board member	3%	3%	3%
Yes, both a board member and a staff member	27%	25%	36%
No	19%	13%	11%

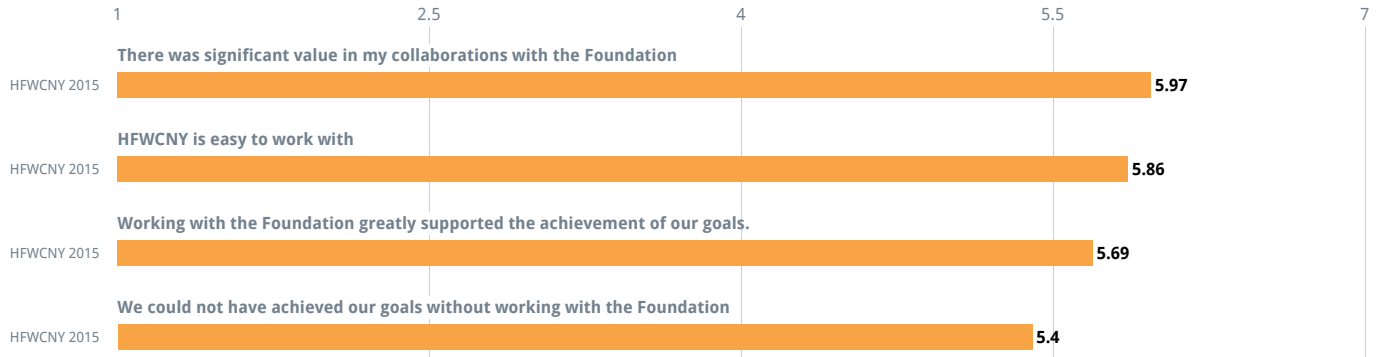
Have you interacted with Foundation staff or a member of its Board within the last year? (By Subgroup)	Only Western NY	Only Central NY	Both Western and Central NY	Neither Western or Central NY
Yes, a staff member	50%	53%	30%	58%
Yes, a board member	2%	3%	10%	1%
Yes, both a board member and a staff member	28%	21%	50%	27%
No	21%	22%	10%	13%

Have you worked directly with the Foundation and its staff in the past? (Overall)	HFWCNY 2015
Yes	81%
No	19%

Have you worked directly with the Foundation and its staff in the past? (By Subgroup)	Only Western NY	Only Central NY	Both Western and Central NY	Neither Western or Central NY
Yes	83%	71%	90%	87%
No	17%	29%	10%	13%

"Rate your level of agreement with the following statements regarding your experience with the Foundation"

■ HFWCNY 2015



"Rate your level of agreement with the following statements regarding your experience with the Foundation"

■ Only Western NY ■ Only Central NY ■ Both Western and Central NY ■ Neither Western or Central NY



Initiating Contact with Foundation Staff

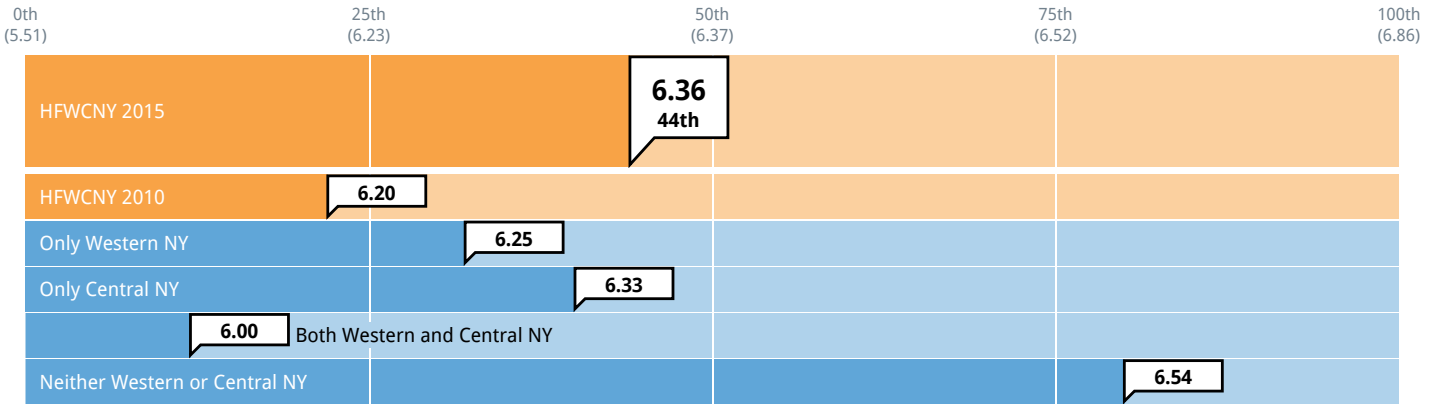
“Have you initiated contact with staff at the Foundation within the last year?”

Have you initiated contact with staff at the Foundation within the last year? (Overall)	HFWCNY 2015	HFWCNY 2010	Average Funder
Yes	59%	63%	67%
No	41%	37%	33%

Have you initiated contact with staff at the Foundation within the last year? (By Subgroup)	Only Western NY	Only Central NY	Both Western and Central NY	Neither Western or Central NY
Yes	56%	62%	70%	61%
No	44%	38%	30%	39%

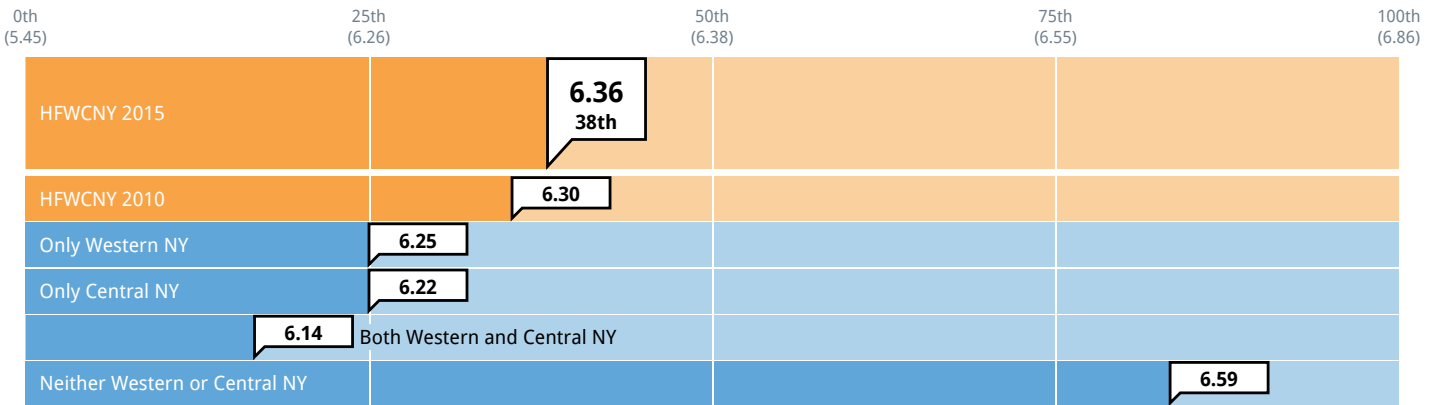
"How responsive was the Foundation staff?"

1 = Not at all responsive, 7 = Very responsive



"How accessible was the Foundation staff?"

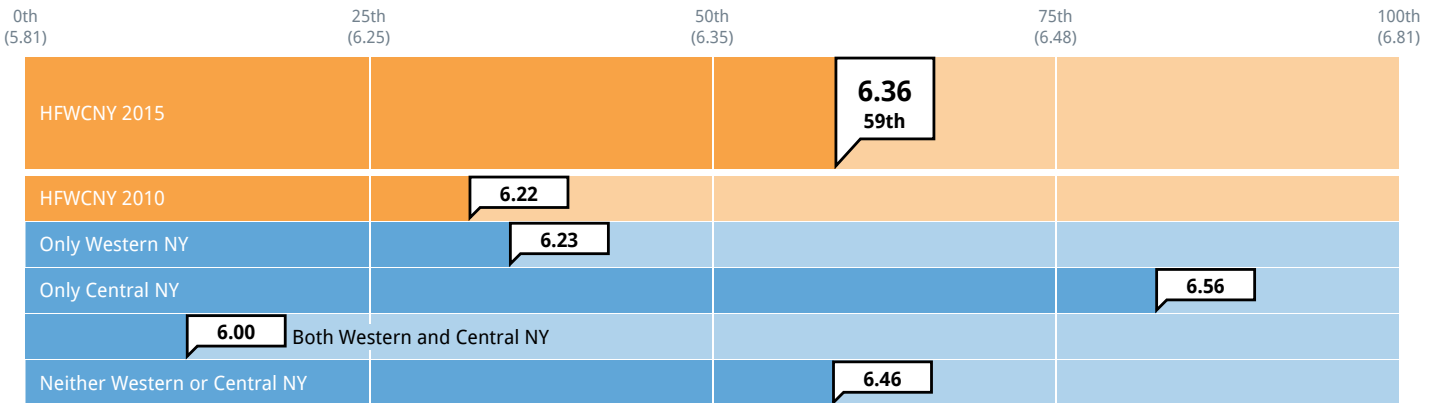
1 = Not at all accessible, 7 = Very accessible



Impressions of Foundation Staff and Board

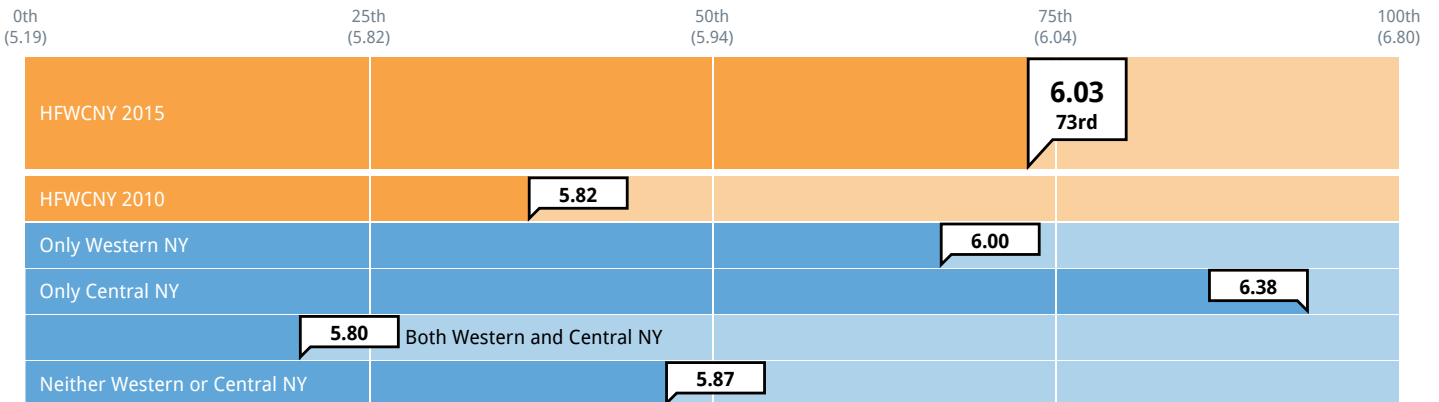
"How would you rate your impression of the Foundation's staff?"

1 = Very negative, 7 = Very positive



"How would you rate your impression of the Foundation's board?"

1 = Very negative, 7 = Very positive



FOUNDATION STRENGTHS AND WEAKNESSES

Foundation Strengths

Stakeholders were asked to comment about the two greatest strengths of the Foundation. 270 stakeholders mentioned 483 strengths. The largest proportion of comments indicated that the Foundation's leadership/staff and its mission/strategic focus are its greatest strengths.

Topic of Foundation Strength	%	N
Leadership / Staff	19%	91
Mission and Strategic Focus	18%	86
Impact on Fields and Communities	14%	66
Assets and Grantmaking	11%	55
Non-monetary Assistance	8%	40
Field and Community Knowledge	8%	37
Other	6%	31
Innovation	6%	30
Relationships	4%	21
Reputation	3%	14
Collaboration	2%	12

Foundation Weaknesses

Stakeholders were asked to comment about the two greatest weaknesses of the Foundation. A total of 200 stakeholders mentioned 298 weaknesses. The largest proportion of stakeholders indicated that the Foundation's mission/strategic focus and its assets/grantmaking are its greatest weaknesses.

Topic of Foundation Weaknesses	%	N
Mission and Strategic Focus	23%	69
Assets and Grantmaking	13%	39
Leadership / Staff	12%	37
Communications	11%	32
Public Relations / Visibility	10%	30
Other	9%	27
Impact on Fields and Communities	9%	27
Interactions	7%	20
Administrative Processes	4%	12
Field and Community Knowledge	2%	5

Selected Comments

Stakeholders were asked to comment about the two greatest strengths and two greatest weaknesses of the Foundation.

Foundation Strengths:

Leadership / Staff (19%, N = 91)

- » "Outstanding talent (staff)"
- » "Ann's commitment, Comfort taking a leadership role in the community, and vision"

Mission and Strategic Focus (18%, N = 86)

- » "Focused approach to improving life for children and elders"
- » "Commitment to important issues, and changing the way to meet goals if necessary"

Impact on Fields and Communities (14%, N = 66)

- » "Ubiquity at many levels of health policy making in NYS"
- » "Leverage funding for community impact"

Assets and Grantmaking (11%, N = 55)

- » "Their global view and support for organizations regardless of their size"
- » "Well-structured, evidence based projects fully supported by the Foundation"

Non-monetary Assistance (8%, N = 40)

- » "Its ability to bring people together, neutral convener"
- » "Fosters collaboration, growth and learning"

Knowledge of Fields and Communities (8%, N = 37)

- » "Level of knowledge on the health issues relevant to the population they focus on"
- » "Understanding of the cutting edge in healthcare system redesign"

Innovation (6%, N = 30)

- » "Their ability to recognize new and innovative ways to promote healthy mothers and babies"
- » "Looking at innovative solutions"

Relationships (4%, N = 21)

- » "Willingness to listen to rising/changing priorities"
- » "Easy to work with"

Reputation (3%, N = 14)

- » "'Heft' - when the foundation speaks, people listen"
- » "Their credibility in the community"

Collaboration (2%, N = 12)

- » "Investment in pooling financial and human capital into channels that can have the greatest impact"
- » "Commitment to working with partners in local communities to make a difference"

Other (6%, N = 31)

Foundation Weaknesses:

Mission and Strategic Focus (23%, N = 69)

- » "Geographic region is limited and does not always match with other pertinent regions - the CNY RPC region"
- » "The vision is at times interpreted differently by different members"
- » "Narrow focus"
- » "Seems still very Buffalo-oriented"

Assets and Grantmaking (13%, N = 39)

- » "Limited resources, but that's not a situation unique to the Health Foundation. All foundations face this problem."
- » "At times decisions for funding don't seem to align with true needs within a community/population"

Leadership / Staff (12%, N = 37)

- » "Lack of a true leadership team when it comes to the creation of the strategy and agreement about how to execute that strategy"
- » "Frankly, many are afraid of executive staff. That's useful, but not always a good thing."
- » "Need to have a few more staff to handle the load of requests"

Communications (11%, N = 32)

- » "Lack of clarity on specific strategies being employed over the long term to achieve stated goals"
- » "Communication about program outcomes are not easily accessible"

Public Relations / Visibility (10%, N = 30)

- » "Need more external communication of positive impact of programs in the community"
- » "Limited public exposure which does not give you the credit you deserve!"

Field and Community Impact (9%, N = 27)

- » "Need greater community presence where their goals plan to support"
- » "Missed opportunities to seriously advocate for children and seniors"

Interactions (7%, N = 20)

- » "Accessibility of the foundation staff. The staff are very busy and it may take days to get a response"
- » "Staff responsiveness and accessibility"

Administrative Processes (4%, N = 12)

- » "Grant process is confusing"
- » "More help with grant submissions"

Knowledge (2%, N = 5)

- » "Not always aware of larger health care environment"

Other Weaknesses (9%, N = 27)

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 grantmaking characteristics.

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

Proportion of Stakeholder Suggestions by Topic:

Topic of Stakeholder Suggestion	%
Grantmaking Characteristics	15%
Mission / Strategic Focus	14%
Staff / Leadership	13%
Community / Field Impact and Understanding	12%
Public Relations / Visibility	9%
Communications	8%
Collaboration	7%
Other	7%
Administrative Process	6%
Interactions	2%
Diversity	2%

Selected Comments

Stakeholders 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.

Grantmaking Characteristics (15%)

- » Grant Size (N = 8)
 - » "I am not sure I agree with their giving a very large number of relatively small grants. If they chose a partner organization that was doing something well, e.g., early child care and gave them a large grant to expand it as a demonstration project, it could serve as a paradigm for other organizations."
 - » "Provide more financial support for those assisting, so they can adequately perform the tasks without detrimental effects with their own work."
 - » "Focus more with its funding resources... fund less projects at a time, and add resources to each project."
- » Grantmaking Orientation (N = 4)
 - » "More flexibility in seeing what kinds of organizations can advance their mission. Not all of them are health-related."
 - » "Be less focused in grant giving. Perhaps add an 'other' category similar to the New York State Foundation."

Mission / Strategic Focus (14%)

- » Field / Program Area Focus (N = 6)
 - » "I think they could just be doing more, impacting more areas... still consistent with their chosen population focuses."
 - » "There are other population needs that the Foundation could help in being a convener or a positive force for change across the community in working to create a broad culture of health."
 - » "Broader priorities to look at the health of the entire poverty population not just the frail elderly and the pre-K children. Issues including lead paint, unsafe housing, community parks...food adequacy..."
- » Geographic Focus (N = 5)
 - » "Would be nice to have Foundation cover contiguous geography."
 - » "We would certainly benefit as a community if there were more resources dedicated to CNY."

Staff / Leadership (13%)

- » Add Staff (N = 5)
 - » "More staff would make for quicker processing of requests."
 - » "Add interns to help keep projects moving forward."
- » Foundation Leadership (N = 5)
 - » "The foundation needs to develop its leadership team as a team. Otherwise, Ann's strong-willed visionary leadership will leave a hole too great for the leadership team to fill as it currently operates."
 - » "The Foundation is not currently the go to resource for its target populations. This appears to be the result of leadership's inability to focus on these populations. The staff-led work that does produce substantial results goes unleveraged (i.e. not used to alter the trajectory of care). In addition, the Foundation leadership appears reticent to engage the business community in their work. There seems to be very little interaction with employers who fund health care, or insurers who broker the employers' funds."

Community / Field Impact and Understanding (12%)

- » Understanding of Communities and Fields (N = 7)
 - » "More activity/presence in Central NY community to know issues/concerns specific to this region."
 - » "Really get an understanding of what the population needs and how services need to be delivered."
 - » "Understand and respect other resources in the community particularly when there are some common goals."

Public Relations / Visibility (9%)

- » Increase (N = 8)
 - » "I hear about HFWCNY projects in pockets all over the place. I think the Foundation might be more impactful with a larger "campaign" approach such as Step up the Falls - then implemented in a number of locations. I think the Falls Prevention program is one of the best things the Foundation has done."
 - » "Continue to articulate its mission, vision and focus areas on a consistent basis."
 - » "More publications; spread!"

Communications (8%)

- » More Frequent (N = 4)
 - » "Newsletters to keep professionals up to date with Foundation activities and possible collaborations."
 - » "Send e-mail once a quarter with coming changes in healthcare and plans for community sessions. Do not communicate too often as it can get to be too much and messages will be deleted."

Collaboration (7%)

- » Other Funders (N = 2)
 - » "The Foundation doesn't really reach into the region of NY where I now work. It would be great if they could work with our Community Foundations to support the health mission."
- » Other (N = 4)
 - » "Mobilize the people they are trying to reach. Focus on Social Determinants of Health by partnering and influencing government and health plans and institutions."
 - » "Collaborative relationships to bring this important work to a national audience."

Administrative Processes (6%)

- » Streamline (N = 3)
 - » "Grant experience in the past has been very prescriptive / rigid in implementation, underfunded for the time required, tedious to implement, and not really worth pursuing."

CONTEXTUAL DATA

Organization Type (Overall)	HFWCNY 2015	HFWCNY 2010	Average Funder
For-profit business	10%	10%	8%
Nonprofit organization	54%	59%	54%
Nonprofit support / intermediary	5%	4%	3%
Media	0%	0%	2%
Foundation	6%	6%	7%
Government	12%	8%	5%
State government	1%	2%	11%
National government	1%	1%	2%
Other	11%	9%	9%

Organization Type (By Subgroup)	Only Western NY	Only Central NY	Both Western and Central NY	Neither Western or Central NY
For-profit business	7%	6%	36%	15%
Nonprofit organization	60%	55%	36%	47%
Nonprofit support / intermediary	2%	6%	9%	8%
Media	N/A	2%	N/A	N/A
Foundation	5%	2%	N/A	10%
Government	14%	26%	N/A	1%
State government	1%	2%	9%	1%
National government	N/A	N/A	N/A	2%
Other	10%	2%	9%	16%

Organization Scope (Overall)	HFWCNY 2015	HFWCNY 2010	Average Funder
Local	66%	61%	31%
State-wide	13%	19%	33%
Regional (Multi-state)	8%	8%	9%
National	13%	13%	25%

Organization Scope (By Subgroup)	Only Western NY	Only Central NY	Both Western and Central NY	Neither Western or Central NY
Local	89%	90%	N/A	21%
State-wide	6%	6%	90%	21%
Regional (Multi-state)	4%	2%	N/A	20%
National	1%	2%	10%	37%

Stakeholder Characteristics

Race/Ethnicity - Overall	CHFWCNY 2015	Full Dataset
Caucasian/White	84%	79%
Hispanic/Latino	2%	5%
African-American/Black	5%	7%
Multi-racial	N/A	2%
American Indian or Alaska Native	N/A	0%
Asian (including the Indian subcontinent)	1%	1%
Pacific Islander	N/A	0%
Other	0%	1%
Prefer not to say	9%	5%

Gender - Overall	HFWCNY 2015	HFWCNY 2010	Full Dataset
Female	68%	67%	48%
Male	26%	29%	48%
Other	N/A	0%	0%
Prefer not to say	6%	4%	3%

Previous Relationship with the Foundation

Past Funding Recipient (Overall)	HFWCNY 2015	HFWCNY 2010	Average Funder
Yes	51%	53%	52%
No	42%	43%	44%

Past Funding Recipient (By Subgroup)	Only Western NY	Only Central NY	Both Western and Central NY	Neither Western or Central NY
Yes	58%	50%	45%	47%
No	36%	45%	27%	48%

Previously Declined Funding Applicant (Overall)	HFWCNY 2015	HFWCNY 2010	Average Funder
Yes	16%	16%	25%
No	70%	74%	64%

Previously Declined Funding Applicant (By Subgroup)	Only Western NY	Only Central NY	Both Western and Central NY	Neither Western or Central NY
Yes	20%	15%	9%	12%
No	61%	76%	55%	78%

Knowledge of the Foundation (Overall)	HFWCNY 2015	HFWCNY 2010	Average Funder
Less than one year	6%	4%	3%
1 year or more but less than 3 years	8%	18%	12%
3 years or more but less than 5 years	17%	31%	17%
More than 5 years	69%	47%	67%

Knowledge of the Foundation (By Subgroup)	Only Western NY	Only Central NY	Both Western and Central NY	Neither Western or Central NY
Less than one year	8%	6%	9%	1%
1 year or more but less than 3 years	4%	6%	9%	14%
3 years or more but less than 5 years	17%	27%	18%	11%
More than 5 years	70%	60%	64%	73%

Additional Survey Information

On many questions in the stakeholder survey, stakeholders 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 stakeholders 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 HFWCNY’s stakeholder survey was 365.

Question	N
How familiar are you with the Foundation?	345
How favorable is your impression of the Foundation?	310
In the areas of the Foundation's work with which you are familiar, to what extent has the Founda...	284
In the areas of the Foundation's work with which you are familiar, to what extent has the Founda...	235
What is the primary information source from which you learn about the Foundation's current goals?	305
How clearly do you understand the Foundation's current goals?	304
In your opinion, has the Foundation chosen the right goals?	299
In your opinion, how effective is the Foundation at addressing each of its specific goals?	208
How clearly do you understand the Foundation's current strategy?	285
Please indicate the extent to which each of the following approaches is effective in supporting...	265
To what extent is the Foundation innovative in the work with which you are familiar?	278
If you were to receive information from the Foundation, how credible would you consider that information?	298
Please indicate whether you have used any of the following Foundation resources within the last year	231
How often have you used the Foundation's resources within the last year?	295
Have you worked directly with the Foundation and its staff in the past?	296
How would you rate your impression of the Foundation's staff?	229
How would you rate your impression of the Foundation's board?	79
Have you initiated contact with staff at the Foundation within the last year?	293
How responsive was the Foundation staff?	174
How accessible was the Foundation staff?	174
Which of the following best describes your organization or institution?	303
How would you describe the scope of your organization's work?	302
In which counties does your organization work? (Please check all that apply)-Allegany	298
How long have you known about the Foundation?	305
Have you ever received funding from the Foundation?	284
Have you ever been declined funding from the Foundation?	257
What is your gender?	293
What is your race/ethnicity?	282
Region of Organization's Work	298
Familiarity with the Foundation	345
Rating of the Foundation's responsiveness	174
Use the Foundation's Website	298
Use Foundation staff consultation	298

Use Publications and reports	298
Use Foundation-sponsored event/workshop	298
Use conference presentations	298
Use Foundation-sponsored learning community	298
Use RFP and Funding Announcements	298
Use the Foundation's Website	295
Use Foundation staff consultation	295
Use Publications and reports	295
Use Foundation-sponsored event/workshop	295
Use conference presentations	295
Use Foundation-sponsored learning community	295

ABOUT CEP & 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.

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