



THE CENTER FOR
EFFECTIVE PHILANTHROPY

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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