

# Stakeholder Assessment Report (STAR)

prepared for

## **Gaylord and Dorothy Donnelley Foundation**

**VERSION 1/11/2013**



THE CENTER FOR  
EFFECTIVE PHILANTHROPY

|  |          |
|--|----------|
| <b>I. Executive Summary</b>  | <b>2</b> |
| II. Introduction   | 4        |
| III. Overall Impressions of the Foundation                             | 9        |
| IV. Foundation's Goals and Strategies                                  | 13       |
| V. Stakeholder Communication with the Foundation                       | 23       |
| VI. Stakeholder Interactions with the Foundation                       | 33       |
| VII. Foundation Strengths, Weaknesses, and Suggestions for Improvement | 40       |
| VIII. Review of Findings   | 44       |
| IX. Analysis and Discussion  | 46       |
| <br><u>Appendix</u>  |          |
| A. Demographics  | 52       |
| B. About the Center for Effective Philanthropy                         | 55       |

**Gaylord and Dorothy Donnelley Foundation is rated above the median funder for every measure in this report.**

Stakeholders describe the Foundation as “thoughtful,” “committed,” “knowledgeable,” and “effective.” For information about the Foundation, a higher than typical proportion of stakeholders rely on in-person contact with Donnelley Foundation, and view the responsiveness and accessibility of staff very positively. Donnelley Foundation chose the population for this stakeholder report – the proportion of stakeholders “very familiar” with Donnelley Foundation and the proportion who have received funding from the Foundation in the past are both higher than typical of the survey populations chosen by other funders that used this survey. These two groups of stakeholders rate the Foundation higher than typical on most measures in the survey.

**Several stakeholders comment that the Foundation could work to improve its outreach and visibility in the field.** Some stakeholders express difficulty understanding the Foundation’s impact and effectiveness, and others request more communications resources to convey Donnelley Foundation’s strategy and achievement of goals.

**The targeted nature of Donnelley Foundation’s strategy in the conservation field is viewed positively by many stakeholders and nearly 40 percent cite the Foundation’s “focus” as its greatest strength.** For the extent to which the Foundation is innovative, stakeholders rate Donnelley higher than all other funders in CEP’s comparative dataset. However, stakeholders are not in complete agreement regarding the efficacy of Donnelley’s goals and strategy, and a few perceive the Foundation’s focus as perhaps too narrow, saying that it “may hamstring efforts to do effective engagement.”

**The Low Country Land Conservation Partnership (LCLCP) and Calumet stakeholder groups have differing perceptions of Donnelley Foundation’s impact and effectiveness.** LCLCP stakeholders rate the Foundation significantly more positively for most measures in the survey, including overall favorability and the Foundation’s advancement of the state of knowledge in the field. Interactions differ between LCLCP and Calumet stakeholders as well – nearly one-fifth of Calumet stakeholders had no interaction with the Foundation staff or board in the past year, whereas all LCLCP stakeholders had a least some form of interaction.

|  |          |
|--|----------|
| I. Executive Summary   | 2        |
| <b>II. Introduction</b>  | <b>4</b> |
| III. Overall Impressions of the Foundation                             | 9        |
| IV. Foundation's Goals and Strategies                                  | 13       |
| V. Stakeholder Communication with the Foundation                       | 23       |
| VI. Stakeholder Interactions with the Foundation                       | 33       |
| VII. Foundation Strengths, Weaknesses, and Suggestions for Improvement | 40       |
| VIII. Review of Findings   | 44       |
| IX. Analysis and Discussion  | 46       |
| <br><u>Appendix</u>  |          |
| A. Demographics  | 52       |
| B. About the Center for Effective Philanthropy                         | 55       |

# Background

- ◆ The Stakeholder Assessment Report (STAR) provides insight about foundation performance based on the perceptions of a foundation by key external stakeholders. The STAR is based on a survey utilizing a set of standard questions. These questions were developed by the Center for Effective Philanthropy (CEP) based on extensive research on key indicators related to foundation effectiveness.
- ◆ Stakeholder perceptions can be helpful in both assessing a funder's overall performance and progress toward goals as well as key strengths and weaknesses.
- ◆ Stakeholder perceptions must be interpreted in light of the unique strategy of the foundation.
  - The survey covers areas in which stakeholders' perceptions might be helpful to a foundation. Low ratings in an area that is not core to a foundation's strategy may not be concerning to a foundation. For example, a foundation that does not focus efforts on public policy would likely receive lower ratings in this area if it is adhering to its strategy.

- ◆ CEP surveyed stakeholders of Gaylord and Dorothy Donnelley Foundation (“Donnelley Foundation”) during October and November of 2012. The target population was selected by Donnelley Foundation. CEP used a confidential survey that was distributed electronically. The details of Donnelley Foundation’s survey is as follows:

| Survey Period             | Number of Stakeholders Surveyed | Number of Responses Received | Survey Response Rate <sup>1</sup> |
|---------------------------|---------------------------------|------------------------------|-----------------------------------|
| October and November 2012 | 64                              | 44                           | 69%                               |

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

| Stakeholder Familiarity with the Foundation |               |          |                  |              |
|---|---------------|----------|------------------|--------------|
|   | Very Familiar | Familiar | Familiar in Name | Not Familiar |
| Donnelley Foundation                        | 64%           | 32%      | 5%               | 0%           |
| Average Funder                              | 49%           | 45%      | 5%               | 2%           |

1: The median response rate for foundations in the comparative dataset is 46%.

# Methodology (2)

- ◆ CEP surveyed stakeholders on a range of topics, eliciting perspectives regarding Donnelley Foundation’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.
- ◆ Donnelley Foundation’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.

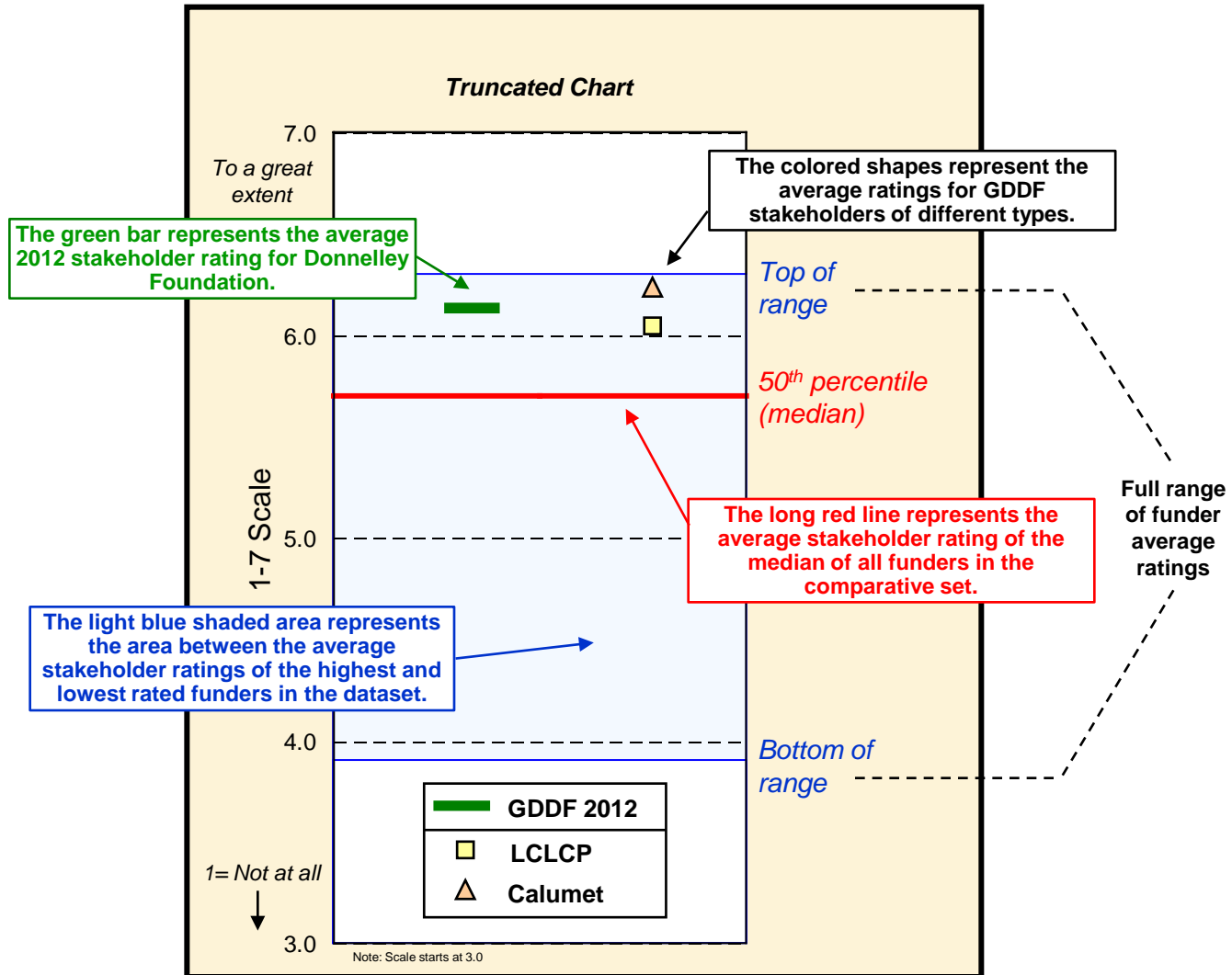
| Characteristics of the Comparative Set |                    |
|--|--------------------|
| Stakeholder Responses                  | 2,863 stakeholders |
| Foundations                            | 19 foundations     |

- ◆ Foundations included in the comparative set:

| Foundations in the Comparative Set                          |  |
|---|--|
| Aetna Foundation  | Helen Andrus Benedict Foundation                                 |
| Alaska Mental Health Trust Authority                        | Kansas Health Foundation   |
| Blue Cross Blue Shield of Massachusetts Foundation          | Lumina Foundation for Education                                  |
| Boston Foundation   | Nellie Mae Education Foundation                                  |
| California HealthCare Foundation                            | Texas Guaranteed Student Loan Corporation Public Benefit Program |
| The Colorado Health Foundation                              | The New York State Health Foundation                             |
| Community Health Foundation of Western and Central New York | The Rhode Island Foundation                                      |
| Endowment for Health  | The SCAN Foundation  |
| Flinn Foundation  | The Skillman Foundation  |
| Gaylord and Dorothy Donnelley Foundation                    |  |

# 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 Donnelley Foundation 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.*



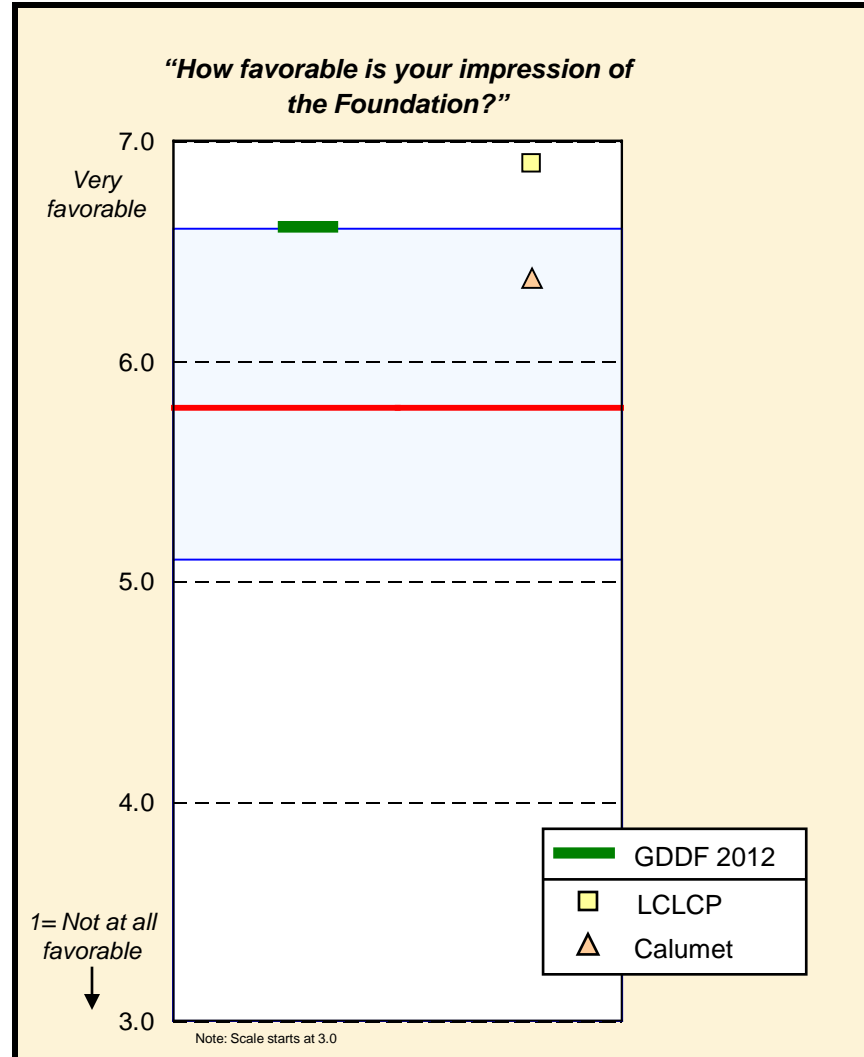


|             |   |          |
|-------------|---|----------|
| I.          | Executive Summary   | 2        |
| II.         | Introduction  | 4        |
| <b>III.</b> | <b>Overall Impressions of the Foundation</b>                      | <b>9</b> |
| IV.         | Foundation's Goals and Strategies                                 | 13       |
| V.          | Stakeholder Communication with the Foundation                     | 23       |
| VI.         | Stakeholder Interactions with the Foundation                      | 33       |
| VII.        | Foundation Strengths, Weaknesses, and Suggestions for Improvement | 40       |
| VIII.       | Review of Findings  | 44       |
| IX.         | Analysis and Discussion   | 46       |
|             | <u>Appendix</u>   |          |
| A.          | Demographics  | 52       |
| B.          | About the Center for Effective Philanthropy                       | 55       |

# Favorability of Impressions of Foundation

On the favorability of stakeholders' impressions, Donnelley Foundation is rated:

- higher than all other funders



# Foundation Descriptors

Stakeholders were asked to provide three words that describe the Foundation today and a number of positive themes emerge. A total of 120 words were provided by 40 stakeholders of Donnelley Foundation.

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

|                       | Categories of Words Describing Donnelley Foundation | Proportion of Stakeholders Citing Category | Examples of Words in this Category   |
|-----------------------|---|--|--|
| Positive Words        | Partnership   | 12%  | “Supportive” “Partner” “Supportive but not intrusive”<br>“Cooperative” “Collaborative” |
|                       | Knowledgeable                                       | 8%   | “Smart” “Competent” “Knowledgeable” “Thoughtful”                                       |
|                       | Effective   | 7%   | “Effective” “Valuable”   |
|                       | Focused   | 7%   | “Focused” “Unique focus on conservation” “Deliberate”                                  |
|                       | Committed   | 6%   | “Committed” “Long-range commitments” “Dedicated”                                       |
|                       | Engaged   | 5%   | “Engaged” “Engaging” “Involved”  |
|                       | Leadership  | 3%   | “Leading” “Leadership”   |
|                       | Professional  | 3%   | “Professional”   |
|                       | Strategic   | 3%   | “Strategic” “Far-sighted” “Funding Opportunities”                                      |
|                       | Accessibility                                       | 2%   | “Accessible” “Nonjudgmental”   |
|                       | Other   | 35%  | “Caring” “Integral” “Protectors” “Inquisitive” “Capacity building”                     |
| Negative General Word | Conservationist                                     | 8%   | “Environment” “Land conservation” “Conservation-minded”                                |
|                       |   |  |  |
|                       | Narrow  | 1%   | “Narrow”   |

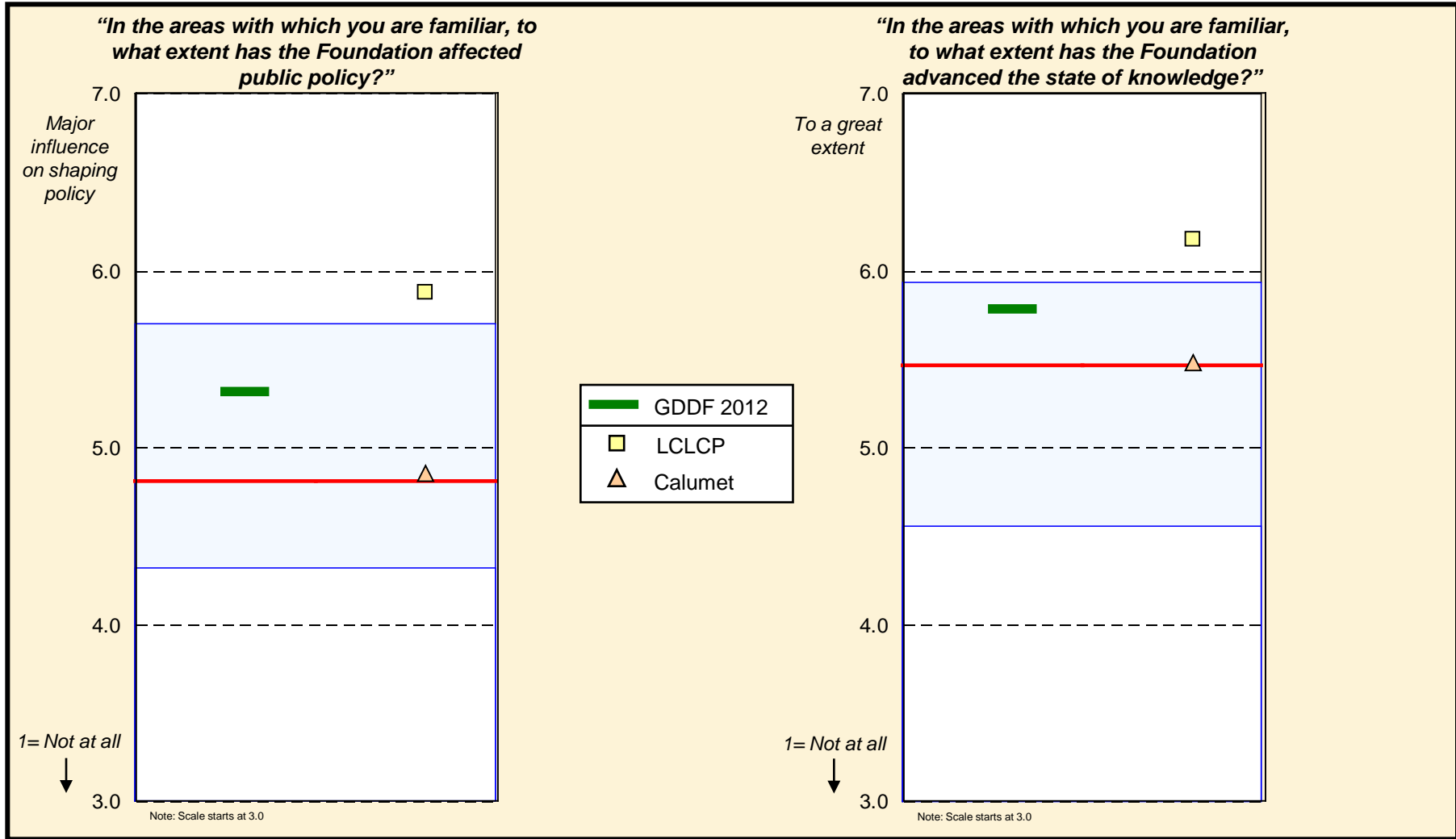
# Foundation's Effect on the Field

On its effect on public policy, Donnelley Foundation is rated:

- above the median funder

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

- above the median funder



Note: The questions depicted on these charts include a “don’t know” response option. In the left-hand chart, 16 percent of Donnelley Foundation respondents answered “don’t know”, compared to 15 percent at the average funder. In the right-hand chart, 7 percent of Donnelley Foundation respondents answered “don’t know”, compared to 7 percent at the average funder.

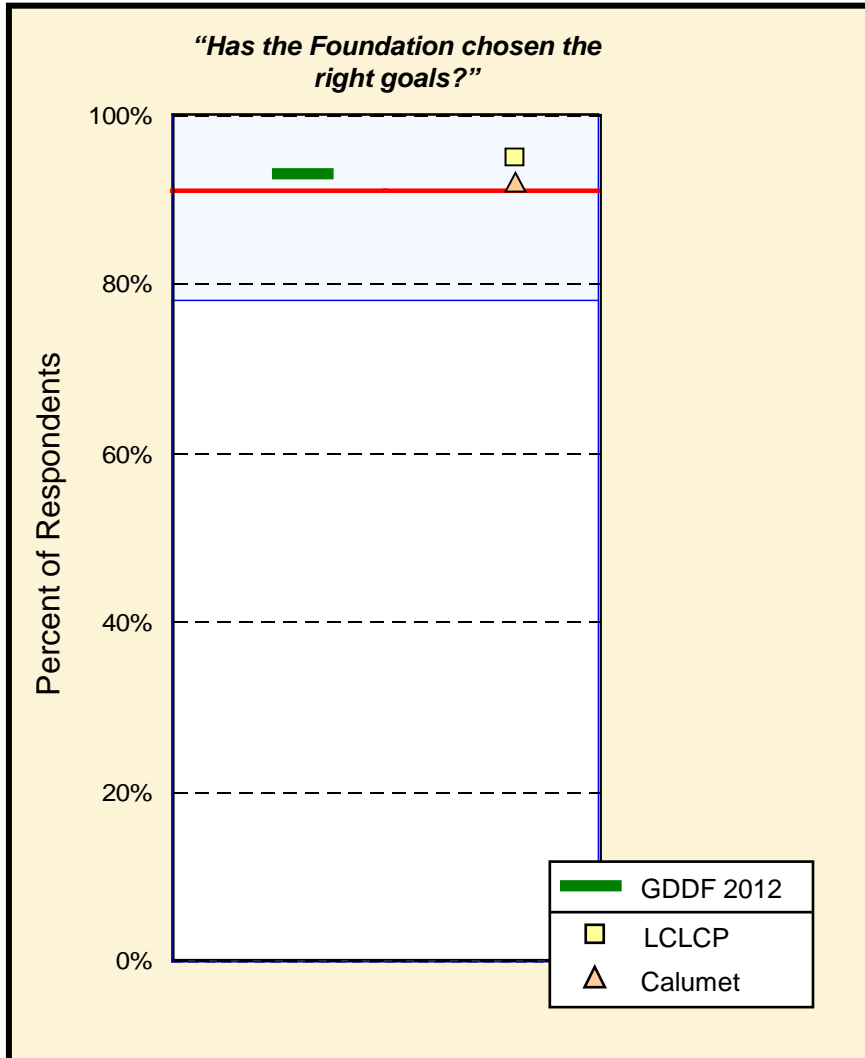
# Contents

|                     |   |           |
|---------------------|---|-----------|
| I.                  | Executive Summary   | 2         |
| II.                 | Introduction  | 4         |
| III.                | Overall Impressions of the Foundation                             | 9         |
| <b>IV.</b>          | <b>Foundation's Goals and Strategies</b>                          | <b>13</b> |
| V.                  | Stakeholder Communication with the Foundation                     | 23        |
| VI.                 | Stakeholder Interactions with the Foundation                      | 33        |
| VII.                | Foundation Strengths, Weaknesses, and Suggestions for Improvement | 40        |
| VIII.               | Review of Findings  | 44        |
| IX.                 | Analysis and Discussion   | 46        |
| <br><u>Appendix</u> |   |           |
| A.                  | Demographics  | 52        |
| B.                  | About the Center for Effective Philanthropy                       | 55        |

# Foundation's Choice of Goals

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

- Similar to the median funder



## Selected Stakeholder Comments

- ◆ *"These goals reflect in-depth discussions and consensus among the Foundation and leading conservation groups, and also reflect community values."*
- ◆ *"[I] would like to see greater emphasis on balancing economic development with environmental protection and preservation."*
- ◆ *"The Foundation's goals are practical and progressive."*
- ◆ *"Narrow focus is important to show meaningful, measurable results. This is not all that common in the foundation world!"*
- ◆ *"My [view] is that the Foundation has become too narrow in its understanding of these goals....I'm not sure with its more narrow focus as of late, if the Foundation is being holistic enough in its understanding of the landscape and engagement with it."*
- ◆ *"The focus on both natural and human communities is a recognition of both the opportunities and challenges of permanently preserving land."*
- ◆ *"I think the big pictures of the goals are correct, but community engagement in natural areas seems to have fallen off of the radar for the Foundation recently."*

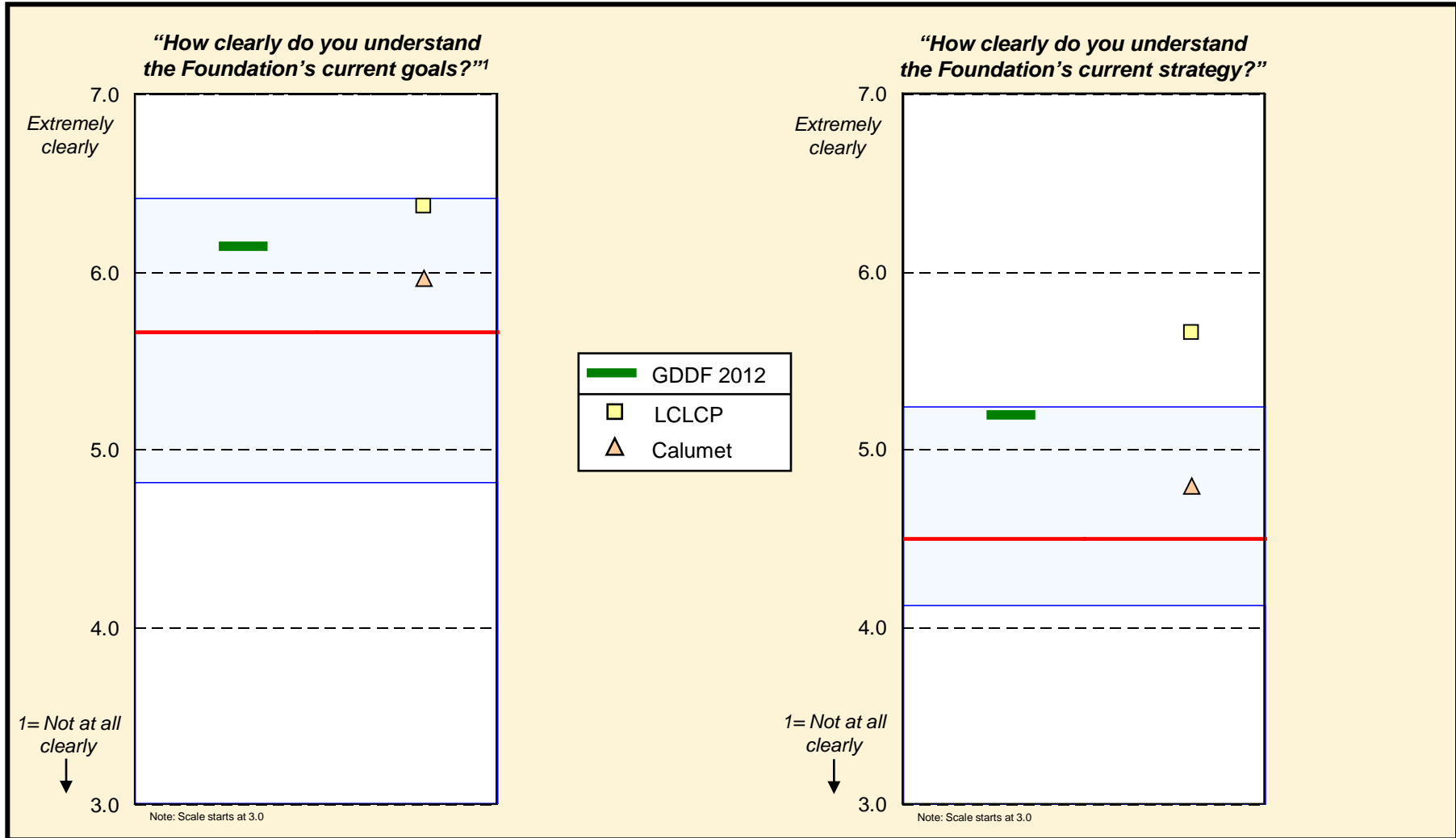
# Stakeholders' Understanding of Goals and Strategy

On the clarity with which its stakeholders understand its goals, Donnelley Foundation is rated:

- above the median funder

On the clarity with which its stakeholders understand its strategy, Donnelley Foundation is rated:

- above the median funder



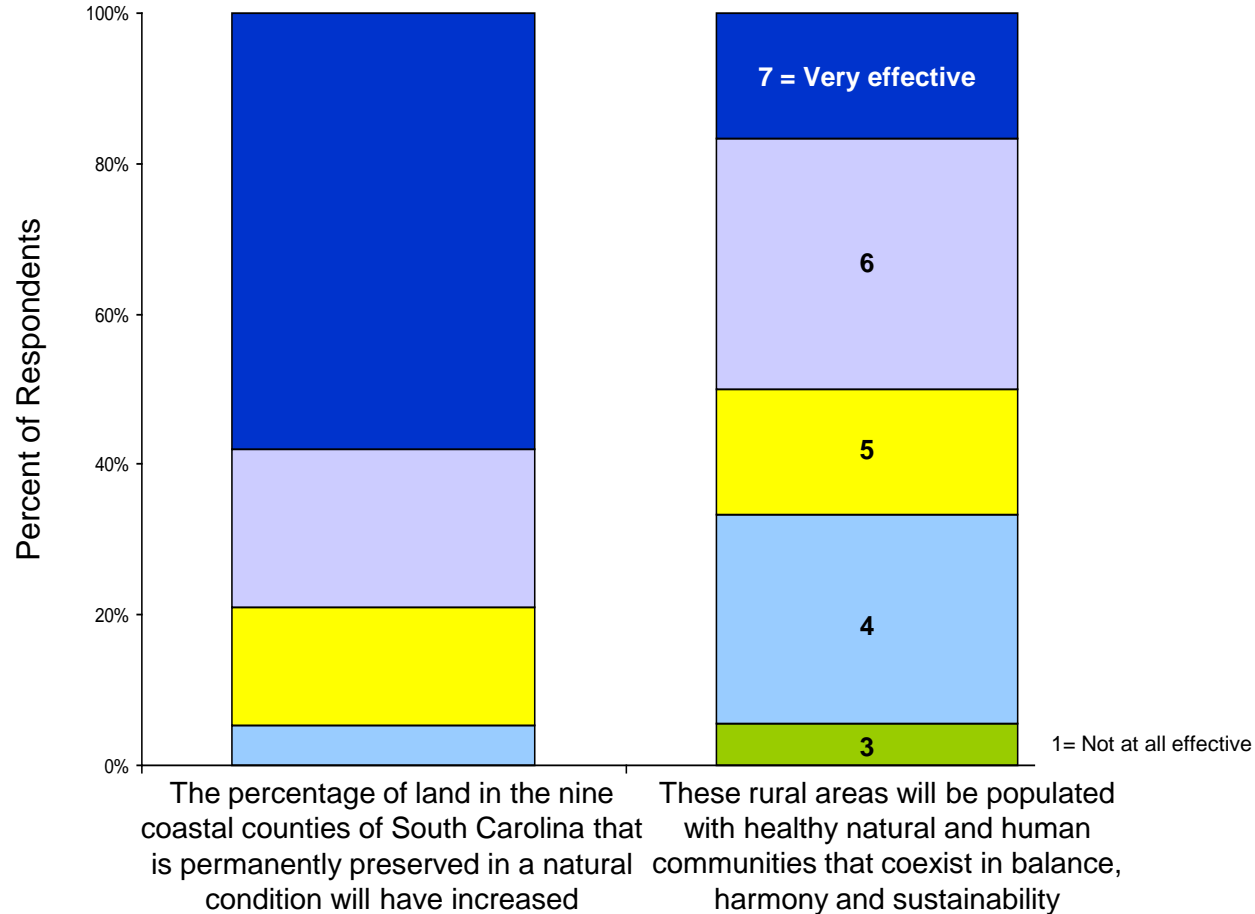
1: Stakeholders were asked to consider each foundation’s specific goals when answering this question. LCLCP and Calumet stakeholders were asked specifically about those groups’ goals.

Note: The question depicted on the right-hand chart included “The Foundation doesn’t appear to have a strategy” as a response option; 0 percent of Donnelley Foundation respondents answered “The Foundation doesn’t appear to have a strategy”, compared to 2 percent at the average funder.

# Effectiveness in Accomplishing Specific Goals (1)

LCLCP stakeholders perceive the Foundation to be more effective in the accomplishment of its goal: “The percentage of land in the nine coastal counties of South Carolina that is permanently preserved in a natural condition will have increased” than in the accomplishment of its goal: “These rural areas will be populated with healthy natural and human communities that coexist in balance, harmony and sustainability.”

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



**Average Rating**

**6.3**

**5.3**

Don't Know

5%

10%

Note: Comparative data not available due to variation by foundation.

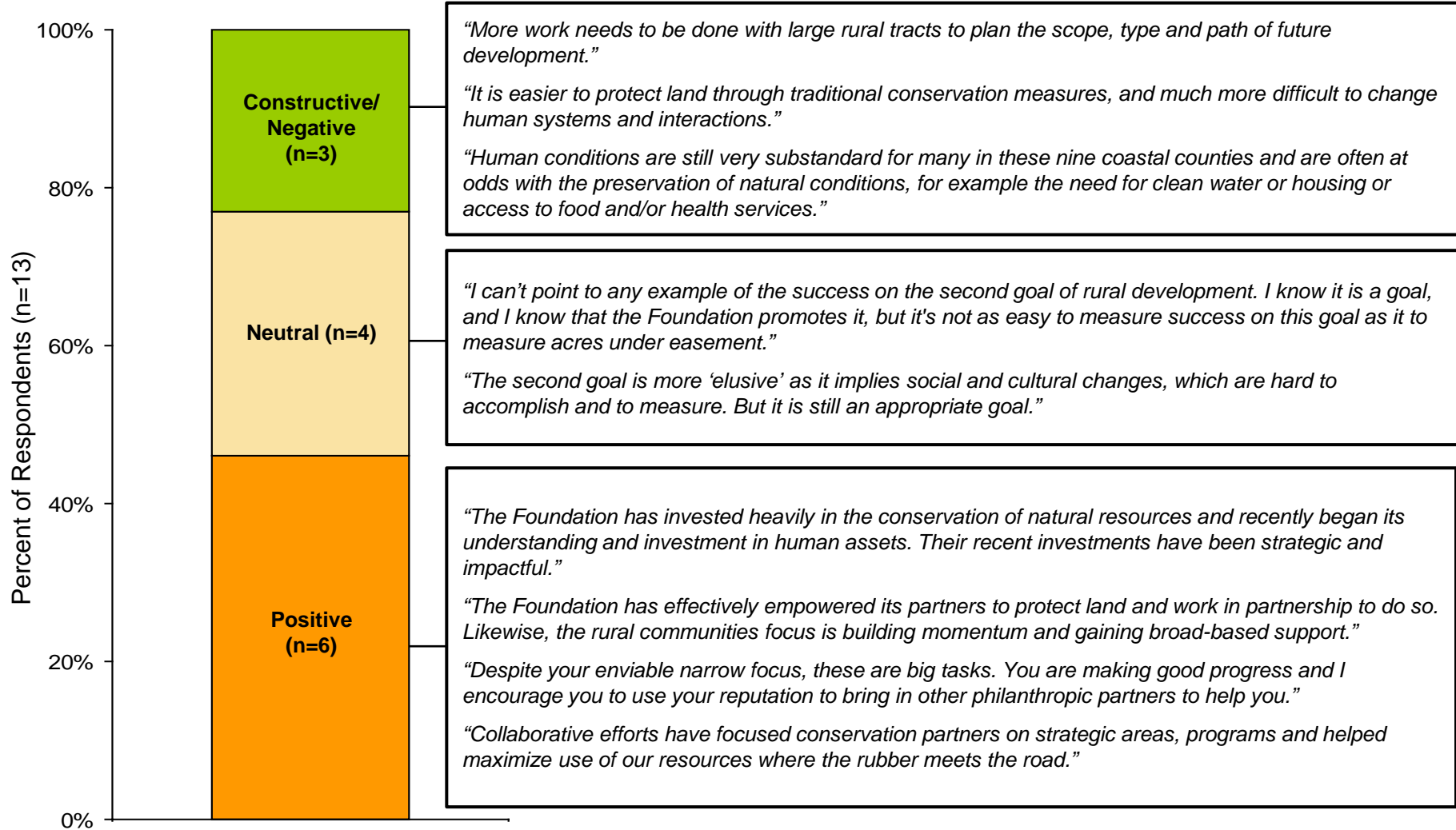
**CONFIDENTIAL** | © The Center for Effective Philanthropy | 7/1/2013



# Effectiveness in Accomplishing Specific Goals (2)

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

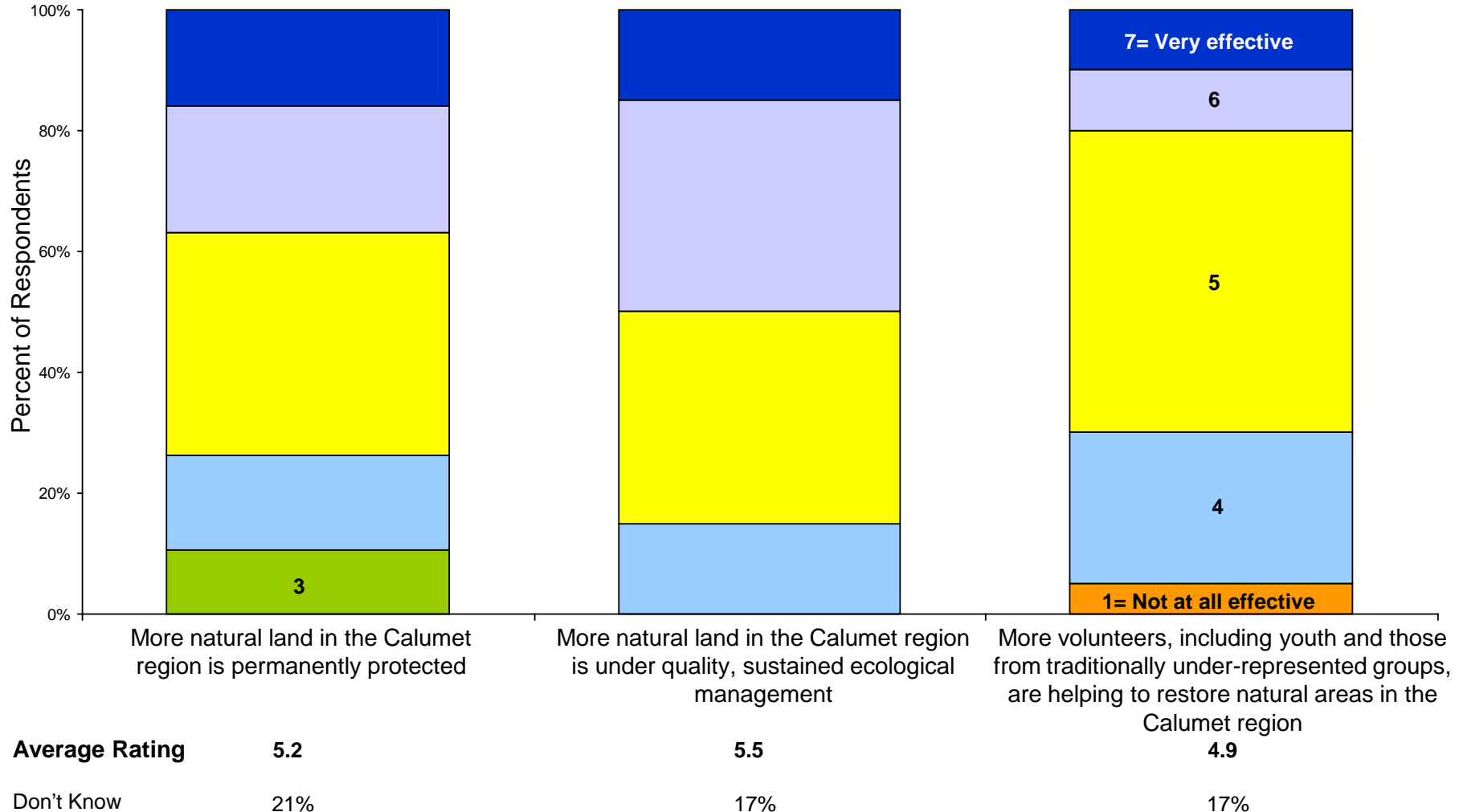
*“In your opinion, how effective is the Foundation at accomplishing each of its specific goals?”*



# Effectiveness in Accomplishing Specific Goals (3)

**Calumet stakeholders** perceive the Foundation to be most effective in the accomplishment of its goal: “More natural land in the Calumet region is under quality, sustained ecological management.”

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



**Average Rating**

**5.2**

**5.5**

**4.9**

Don't Know

21%

17%

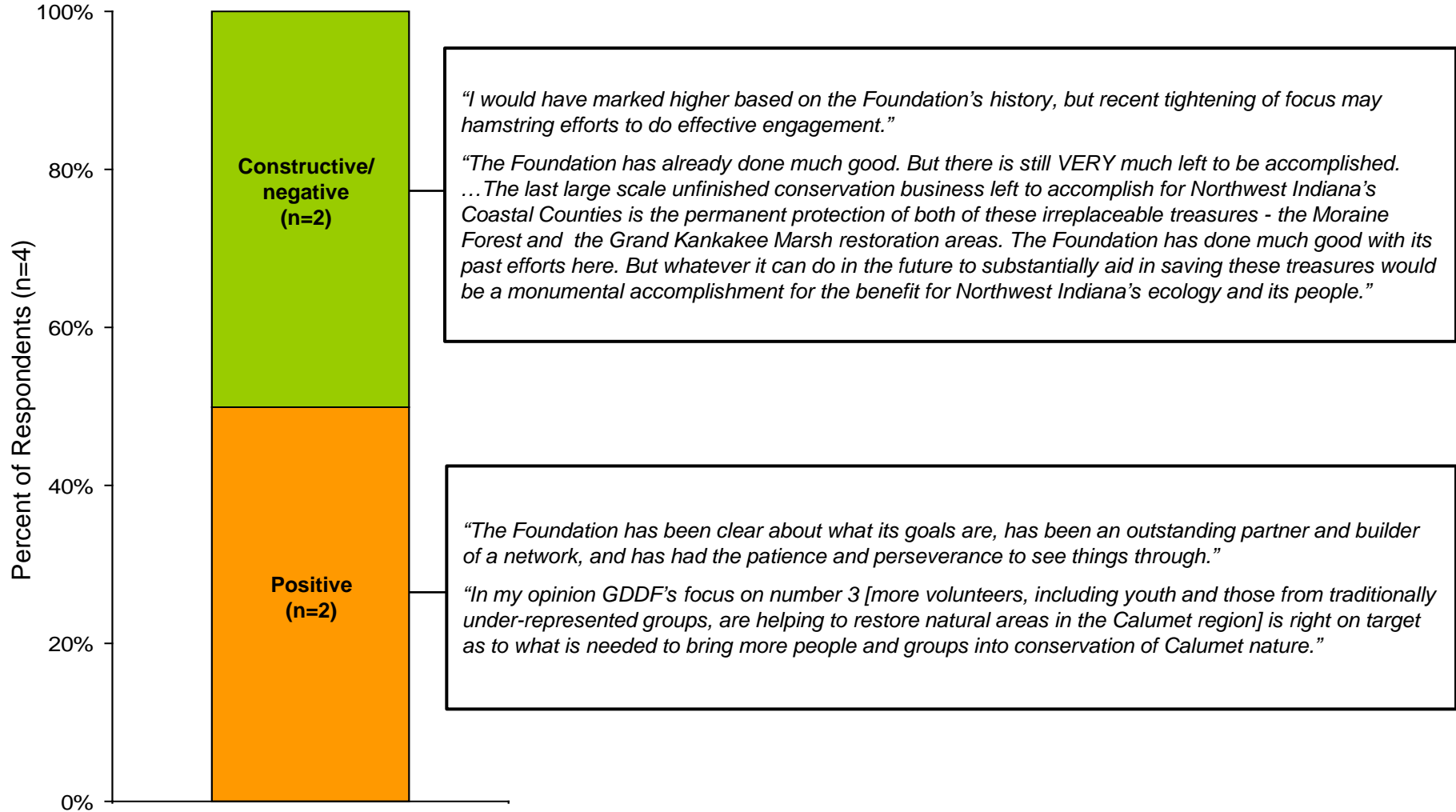
17%

Note: Comparative data not available due to variation by foundation.

# Effectiveness in Accomplishing Specific Goals (4)

Calumet 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?”*

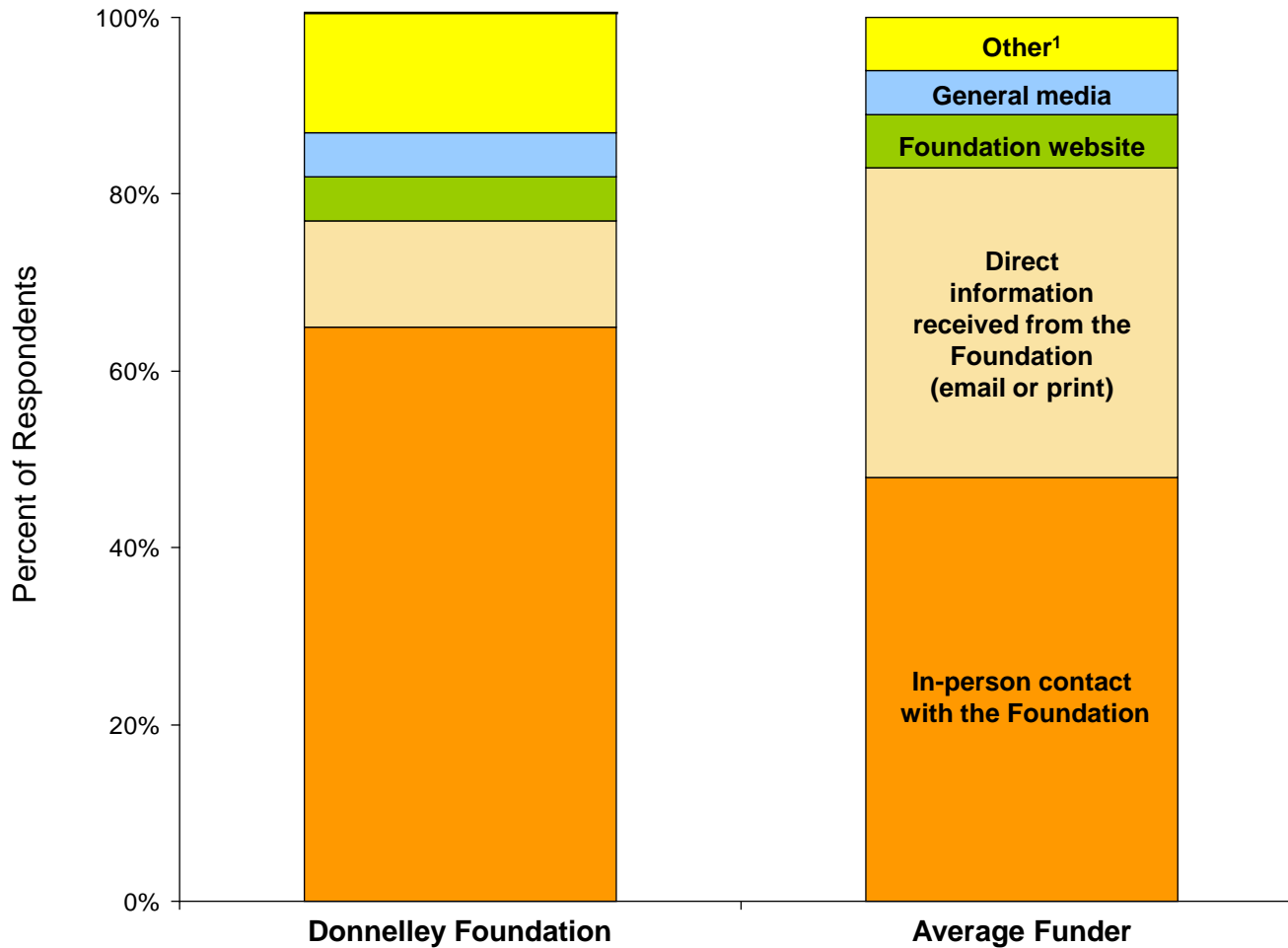


# Information Sources on Goals and Strategies (1)

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

- larger than that of the average funder

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

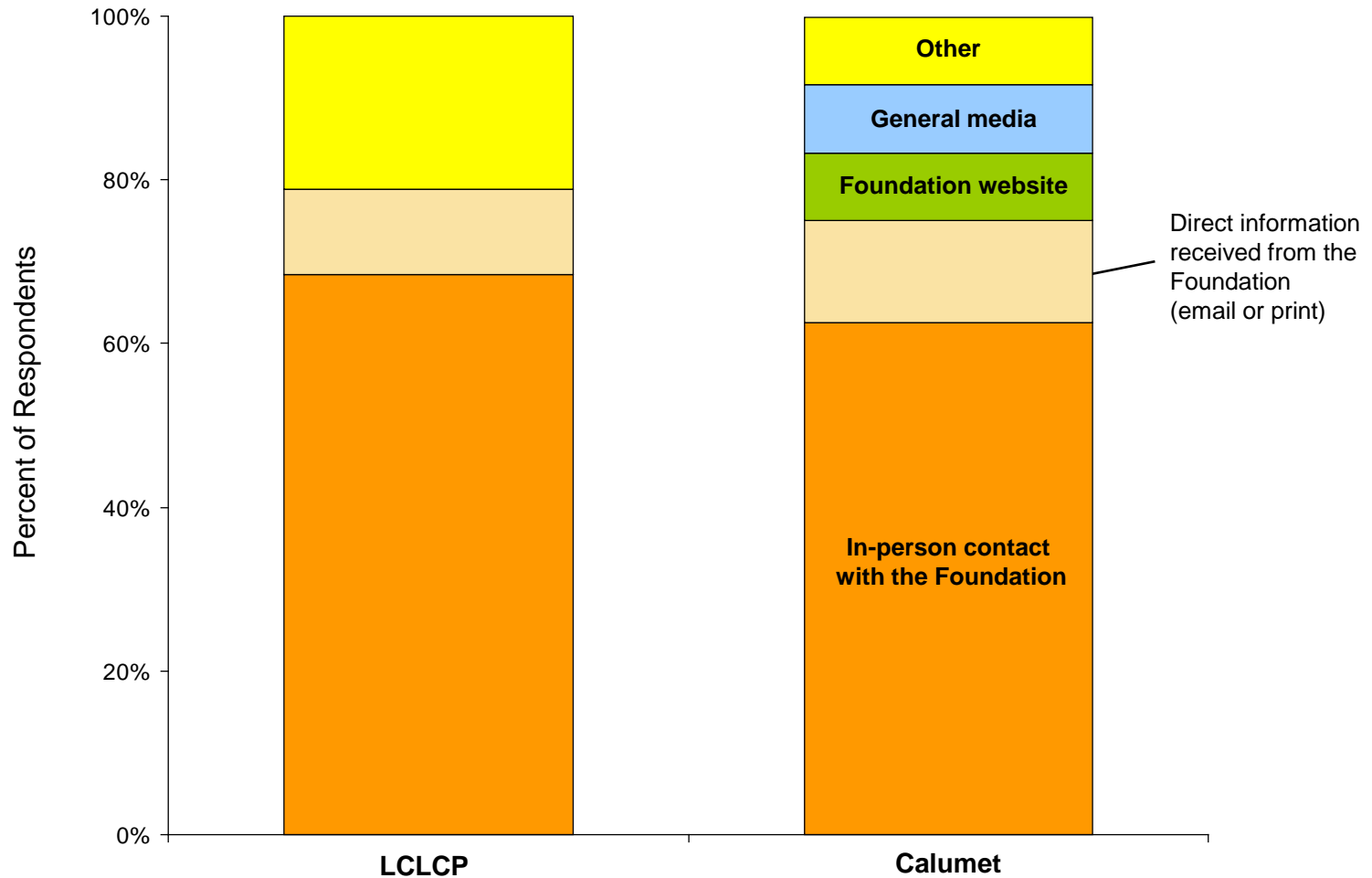


1: GDDF stakeholders answering “Other” cited colleagues, partner organizations, Low Country land trusts, and the Sewee to Santee Forum as their primary source of information about the Foundation’s current goals and strategy.

# Information Sources on Goals and Strategies (2)

Both LCLCP and Calumet stakeholders most frequently report that their primary information source for learning about the Foundation’s current goals and strategy is through in-person contact with the Foundation. However, Calumet stakeholders are more likely than those from LCLCP to report using general media or the Foundation’s website as their primary sources of information.

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



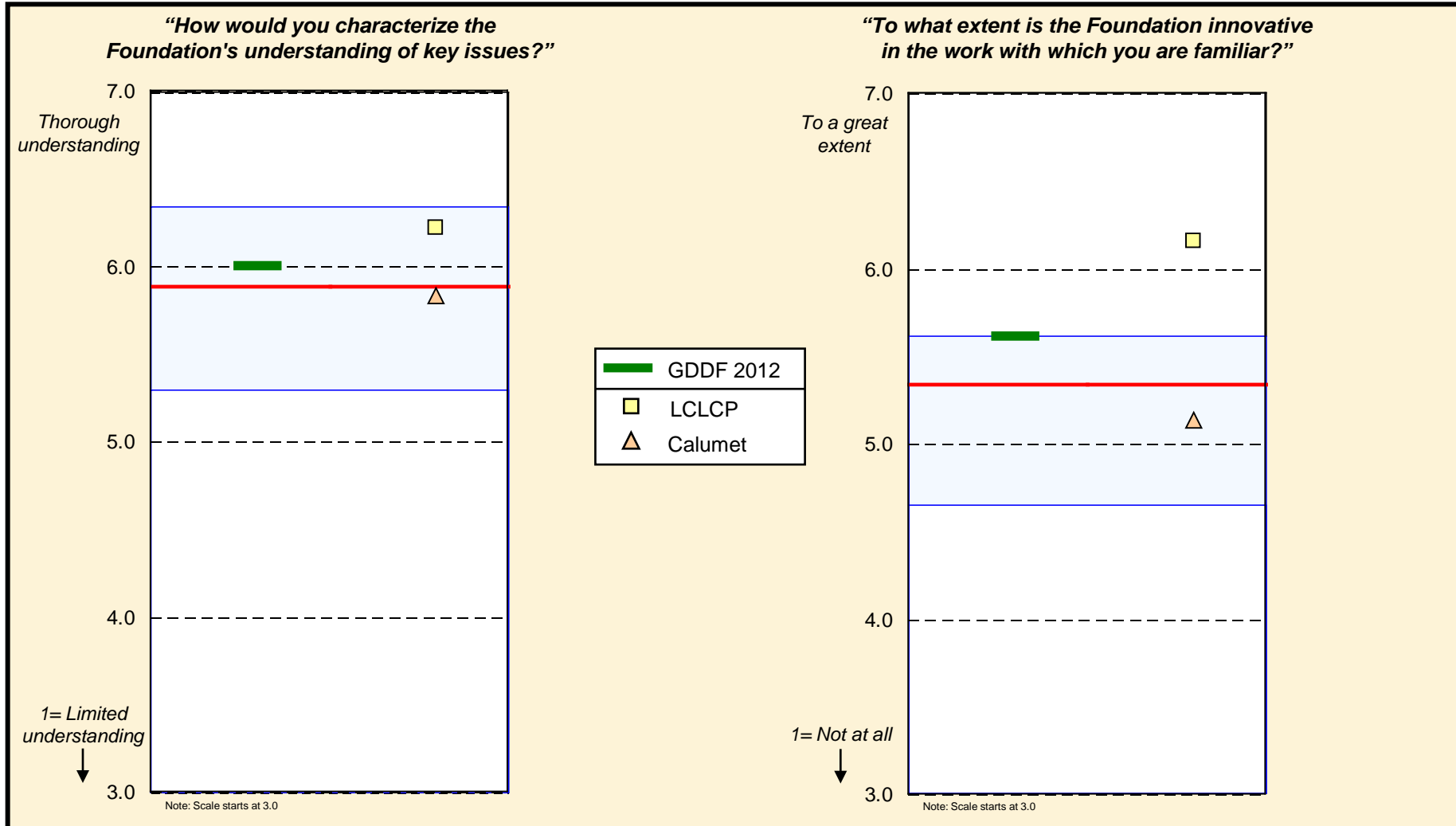
# External Focus of the Foundation

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

- similar to the median funder

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

- higher than all other funders



Note: The questions depicted on these charts include a “don't know” response option. In the left-hand chart, 2 percent of Donnelley Foundation respondents answered “don't know”, compared to 3 percent at the average funder. In the right-hand chart, two percent of Donnelley Foundation respondents answered “don't know”, compared to 7 percent at the average funder.

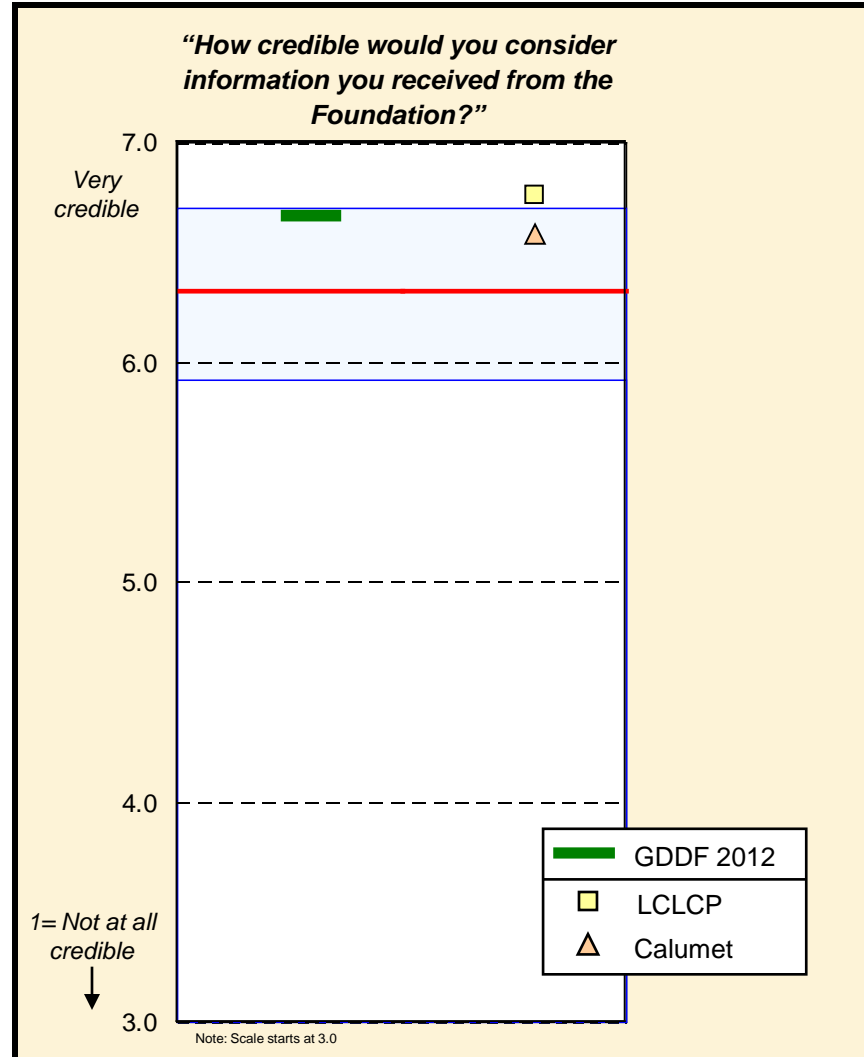
# Contents

|                     |   |           |
|---------------------|---|-----------|
| I.                  | Executive Summary   | 2         |
| II.                 | Introduction  | 4         |
| III.                | Overall Impressions of the Foundation                             | 9         |
| IV.                 | Foundation's Goals and Strategies                                 | 13        |
| <b>V.</b>           | <b>Stakeholder Communication with the Foundation</b>              | <b>23</b> |
| VI.                 | Stakeholder Interactions with the Foundation                      | 33        |
| VII.                | Foundation Strengths, Weaknesses, and Suggestions for Improvement | 40        |
| VIII.               | Review of Findings  | 44        |
| IX.                 | Analysis and Discussion   | 46        |
| <br><u>Appendix</u> |   |           |
| A.                  | Demographics  | 52        |
| B.                  | About the Center for Effective Philanthropy                       | 55        |

# Credibility of Information from the Foundation

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

- above the median funder



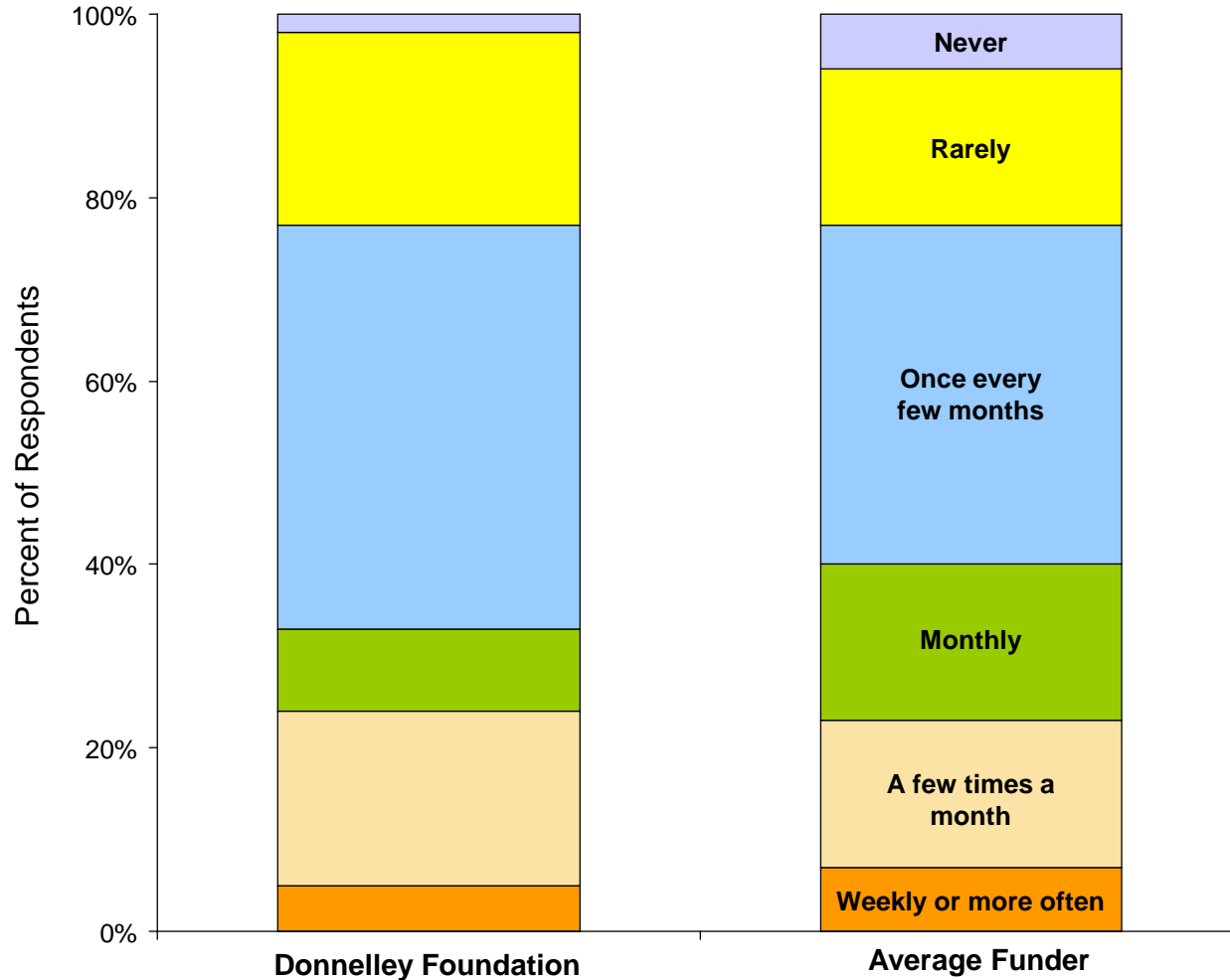


# Use of Foundation Resources (1)

The proportion of Donnelley Foundation stakeholders that report having rarely or never used the Foundation's resources in the last year is:

- similar to that of the average funder

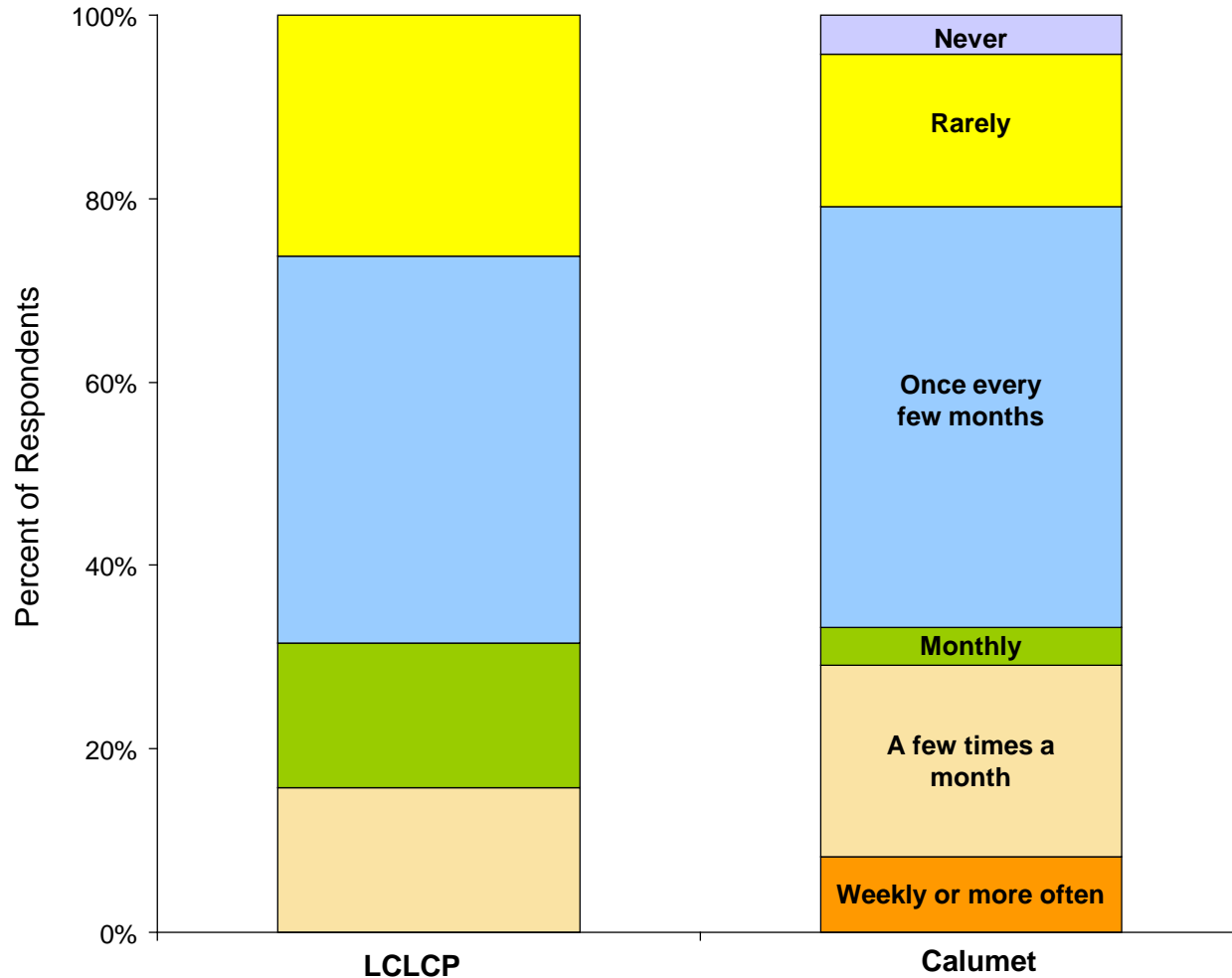
*“How often have you used the Foundation’s resources within the last year?”*



# Use of Foundation Resources (2)

The proportion of **Calumet stakeholders** that report having used the Foundation's resources at least a few times a month is larger than that proportion of LCLCP stakeholders.

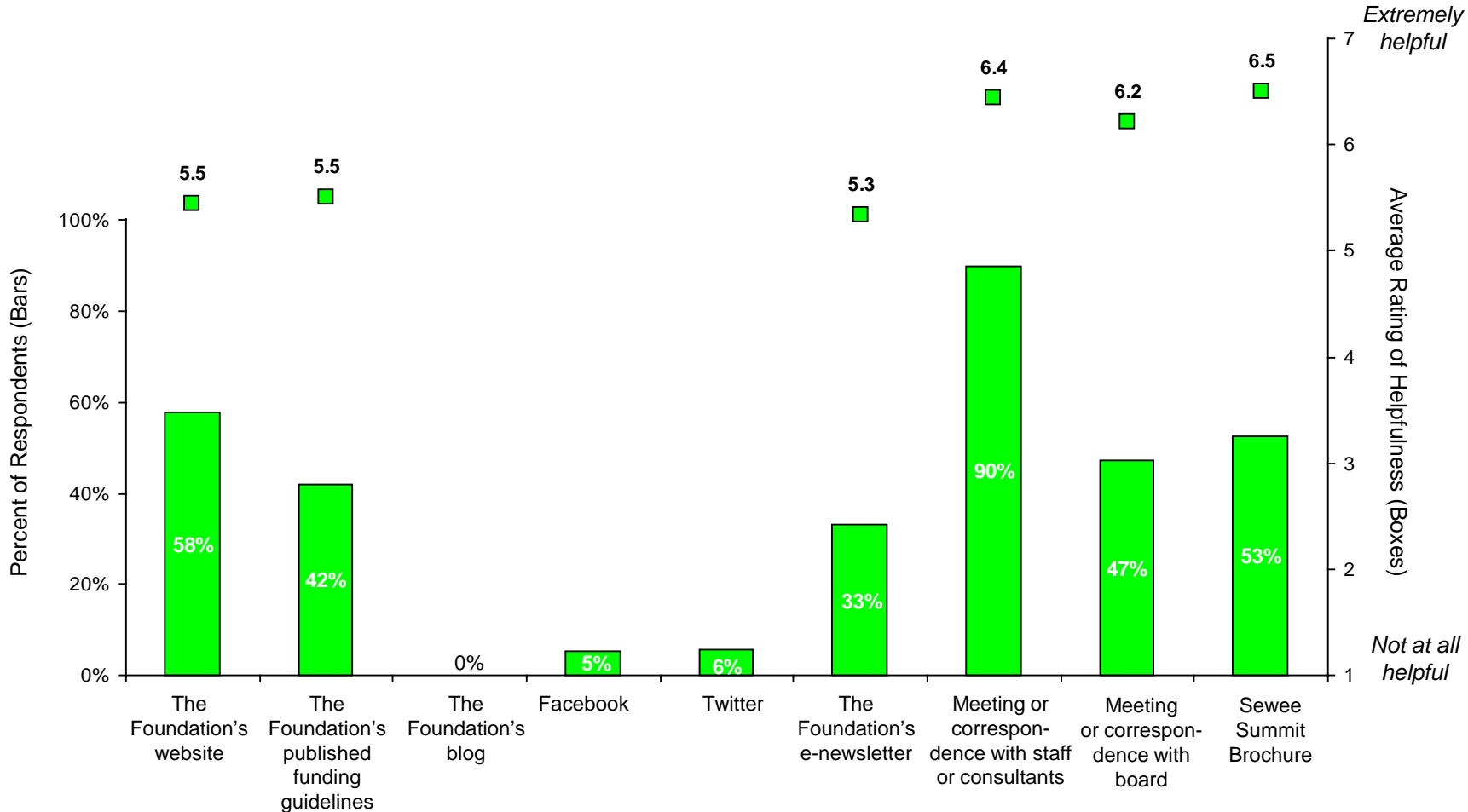
*"How often have you used the Foundation's resources within the last year?"*



# Learning About the Foundation (1)

When learning about the Foundation, **LCLCP stakeholders** most frequently use meeting or correspondence with staff or consultants and rate this more helpful than other resources.

*“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.”*

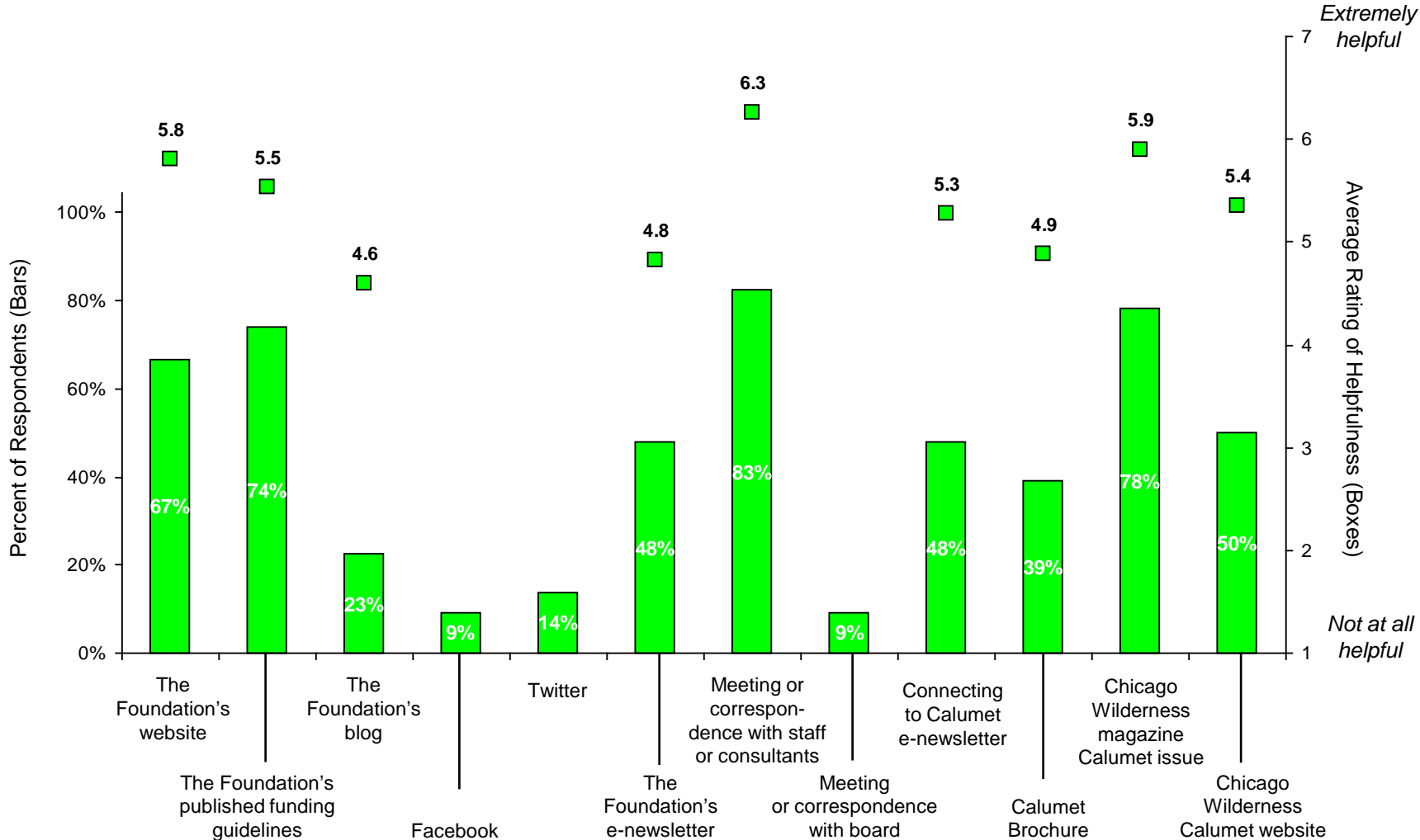


Note: Comparative data not available due to variation by foundation. Helpfulness ratings not shown for options with fewer than 5 respondents.

# Learning About the Foundation (2)

When learning about the Foundation, **Calumet stakeholders** most frequently use meeting or correspondence with staff or consultants and rate it more helpful than other resources.

*“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.”*

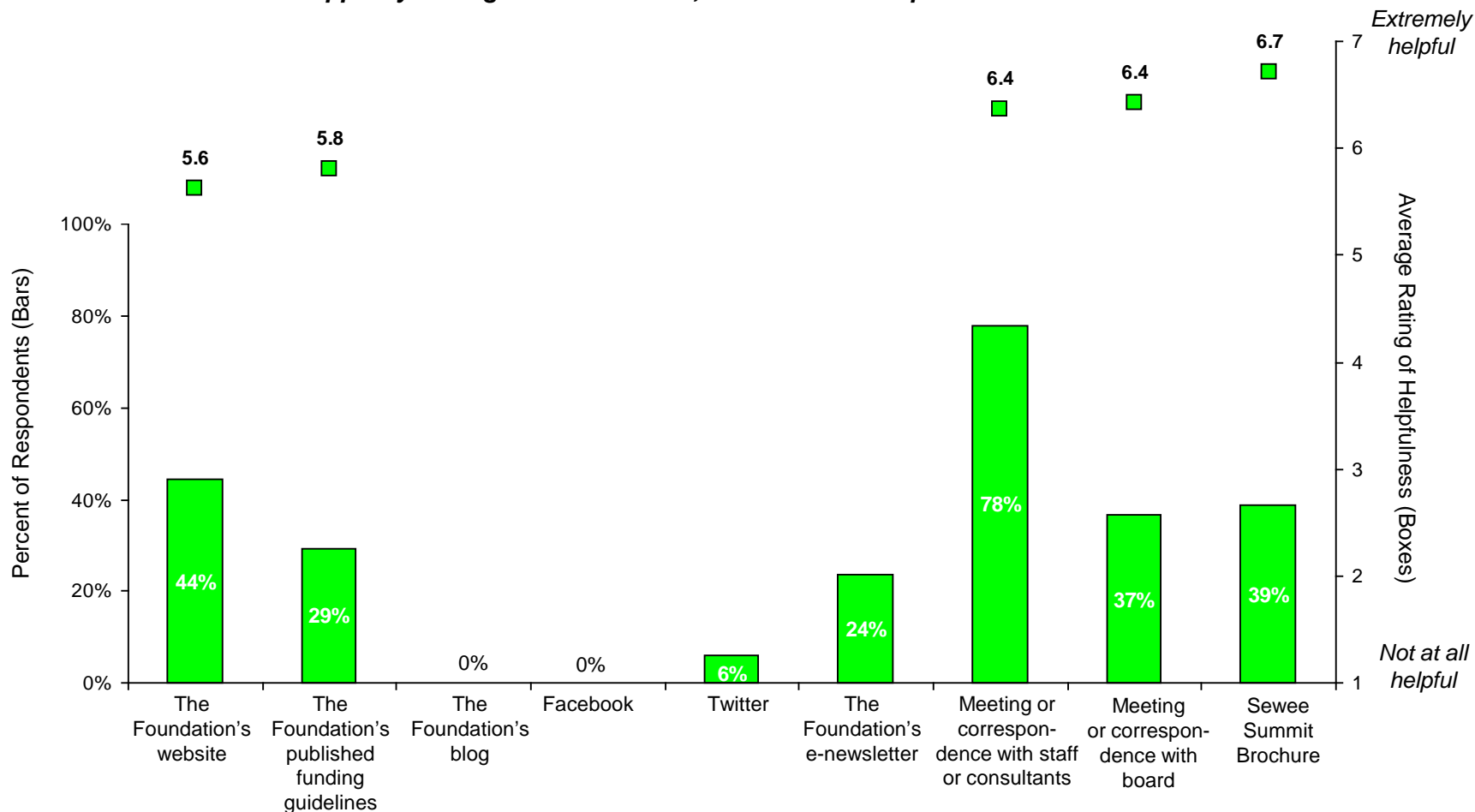


Note: Comparative data not available due to variation by foundation. Helpfulness ratings not shown for options with fewer than 5 respondents.

# Supporting Your Organization's Work (1)

To support their organizations' work, **LCLCP stakeholders** most frequently utilize meeting or correspondence with staff or consultants and the Foundation's website, and find these resources more helpful than others.

*"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."*

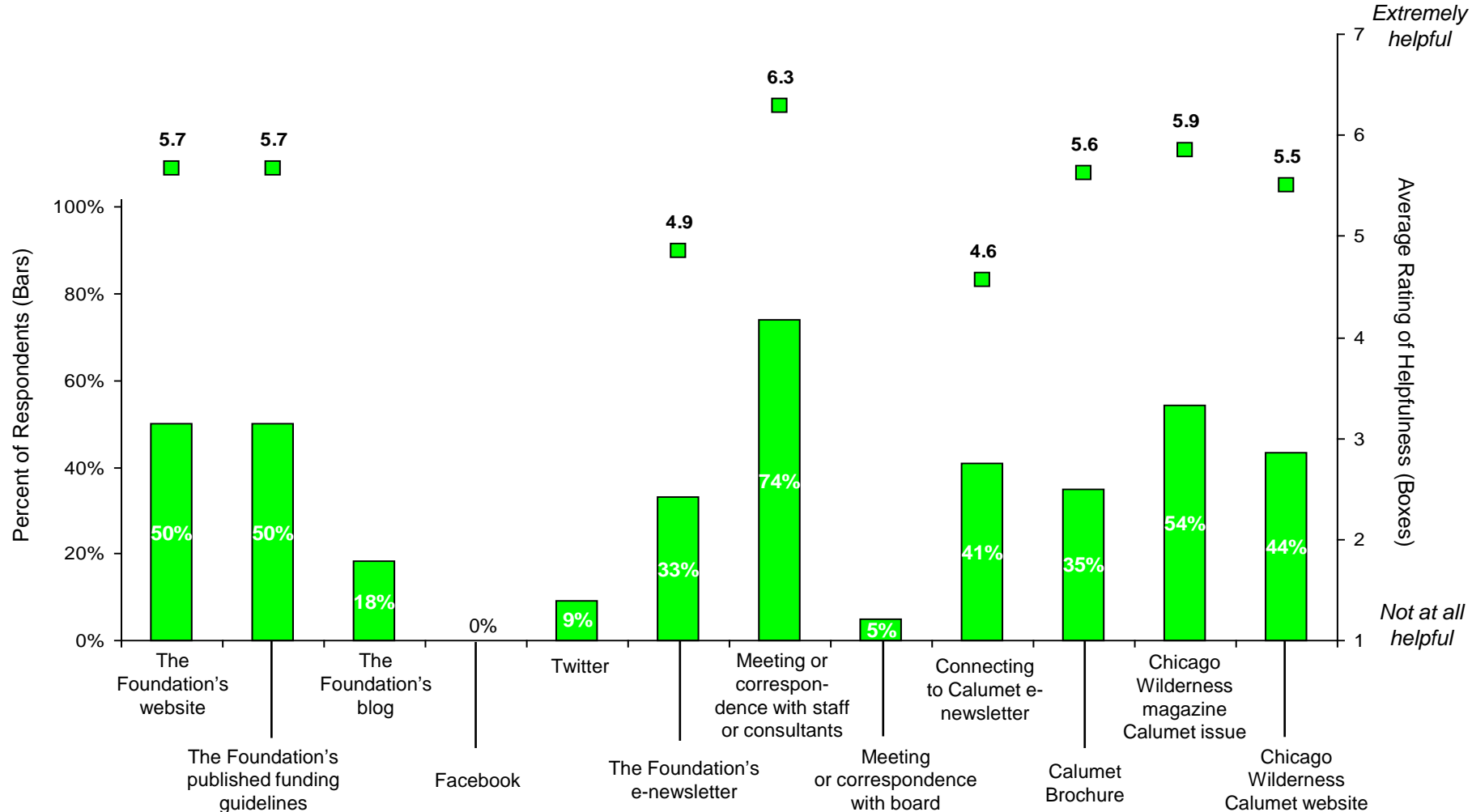


Note: Comparative data not available due to variation by foundation. Helpfulness ratings not shown for options with fewer than 5 respondents.

# Supporting Your Organization's Work (2)

To support their organizations' work, **Calumet stakeholders** most frequently utilize meeting or correspondence with staff or consultants and the Chicago Wilderness magazine Calumet issue and find these resources more helpful than others.

*"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."*

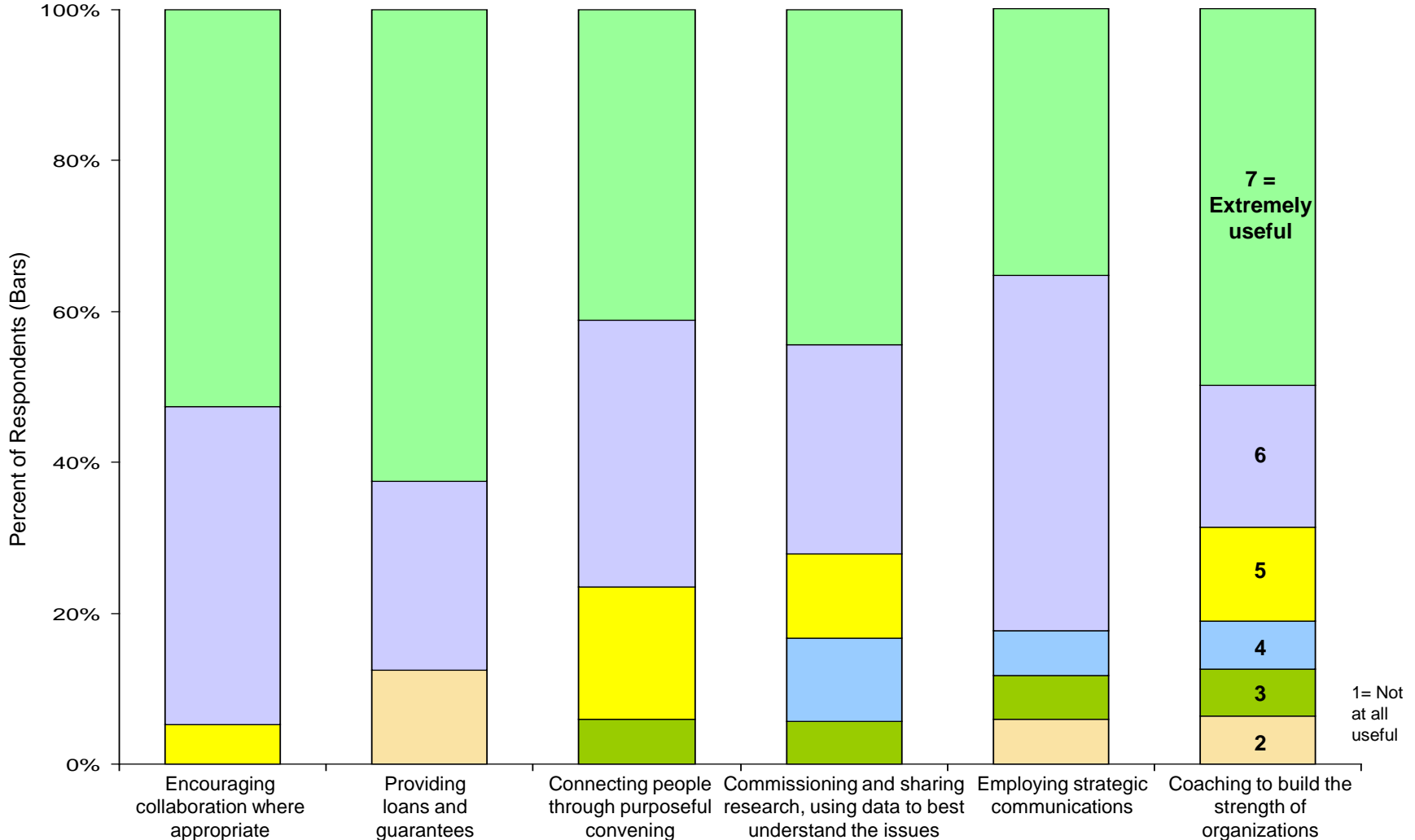


Note: Comparative data not available due to variation by foundation. Helpfulness ratings not shown for options with fewer than 5 respondents.

# Tools Beyond Grantmaking (1)

To accomplish its goals, the Foundation utilizes several tools other than grantmaking. **LCLCP stakeholders** find *encouraging collaboration where appropriate* to be the most useful of these tools.

*How useful do you consider each of the following tools to be in helping the Foundation achieve its objectives?*



1= Not at all useful

**LCLCP Average Rating 6.5**

Percent of respondents answering "Don't know" 5%

**6.1**

15%

**6.1**

10%

**5.9**

5%

**5.8**

10%

**5.8**

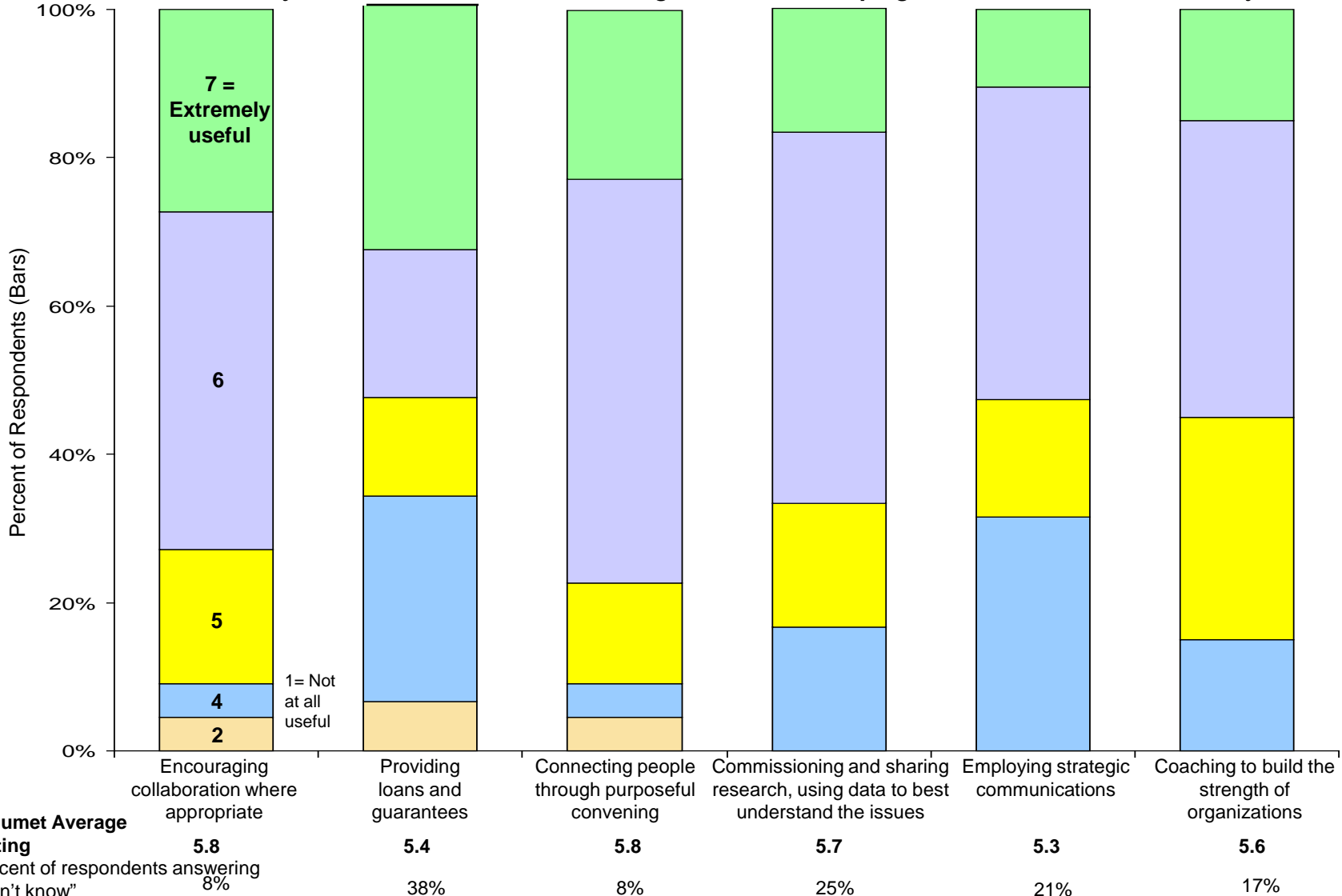
15%

Note: Comparative data not available due to variation by foundation.

# Tools Beyond Grantmaking (2)

To accomplish its goals, the Foundation utilizes several tools other than grantmaking. **Calumet stakeholders** find *encouraging collaboration where appropriate* and *connecting people through purposeful convening* to be the most useful of these tools.

*How useful do you consider each of the following tools to be in helping the Foundation achieve its objectives?*





# Contents

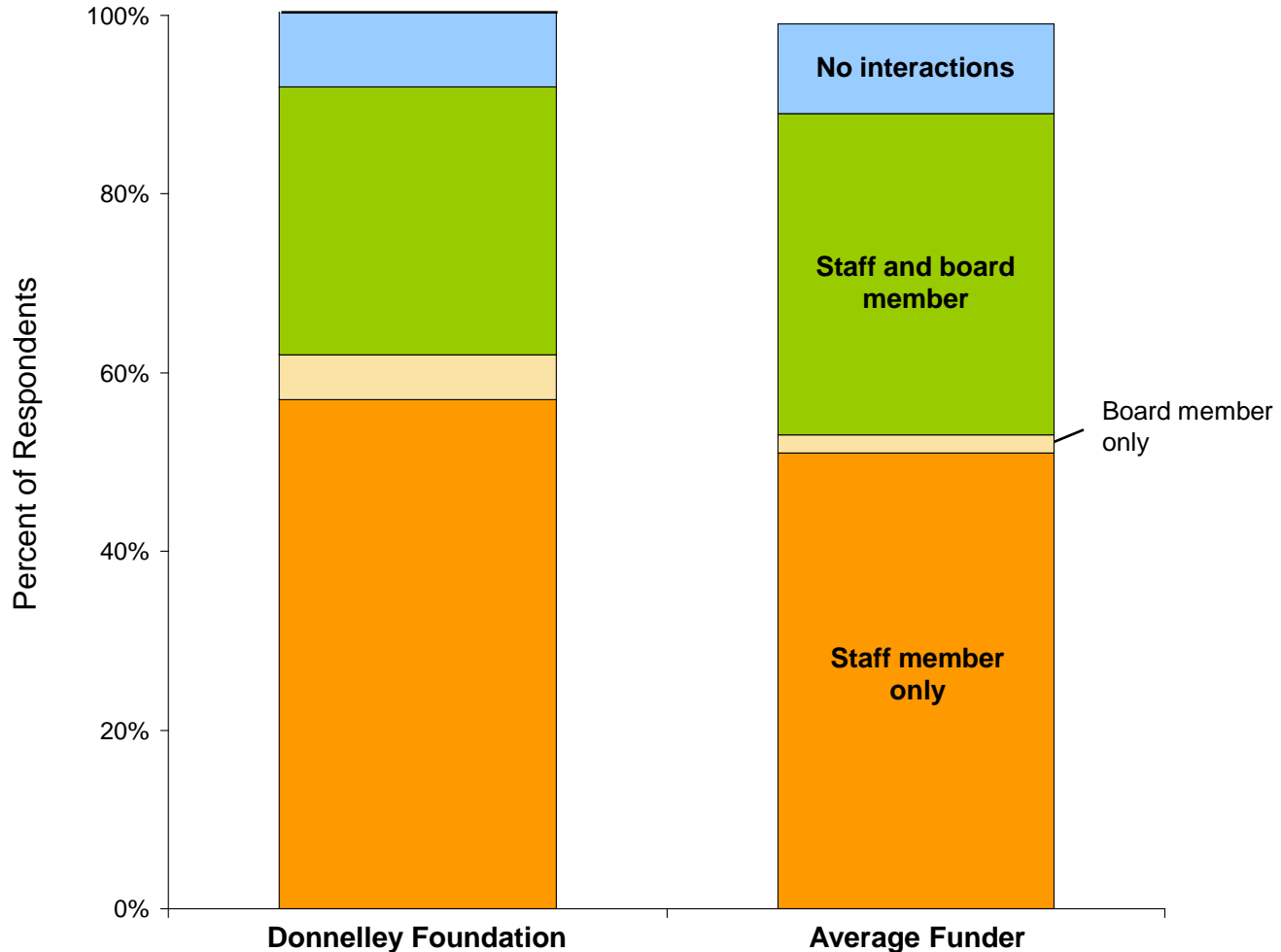
|                     |   |           |
|---------------------|---|-----------|
| I.                  | Executive Summary   | 2         |
| II.                 | Introduction  | 4         |
| III.                | Overall Impressions of the Foundation                             | 9         |
| IV.                 | Foundation's Goals and Strategies                                 | 13        |
| V.                  | Stakeholder Communication with the Foundation                     | 23        |
| <b>VI.</b>          | <b>Stakeholder Interactions with the Foundation</b>               | <b>33</b> |
| VII.                | Foundation Strengths, Weaknesses, and Suggestions for Improvement | 40        |
| VIII.               | Review of Findings  | 44        |
| IX.                 | Analysis and Discussion   | 46        |
| <br><u>Appendix</u> |   |           |
| A.                  | Demographics  | 52        |
| B.                  | About the Center for Effective Philanthropy                       | 55        |

# Staff and Board Interactions (1)

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

- smaller than that of the average funder

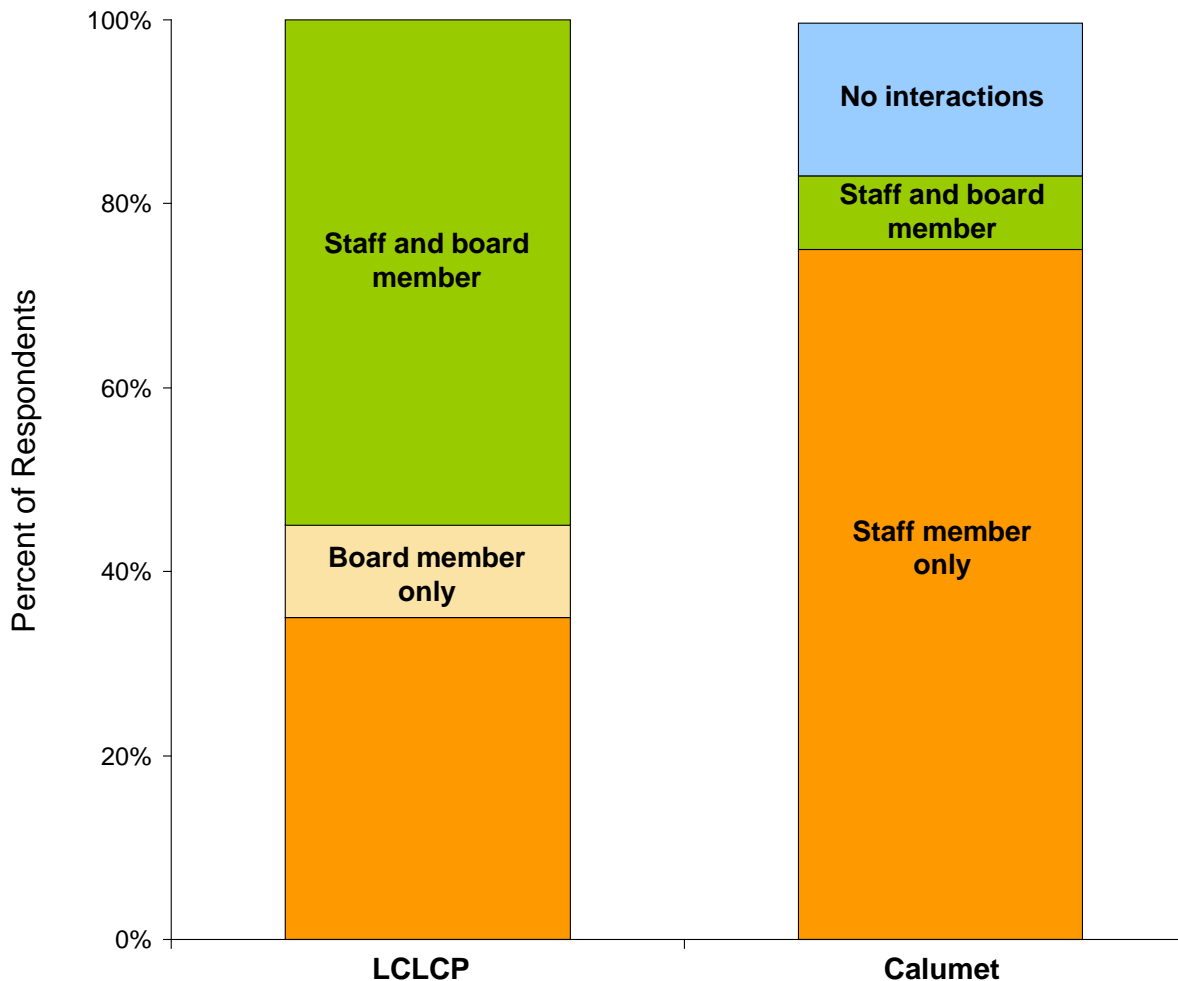
*“Have you interacted with Foundation staff or a member of its Board within the last year?”*



# Staff and Board Interactions (2)

Fifty-five percent of LCLCP stakeholders report interacting with both a Foundation staff member and a Foundation board member in the past year; no Calumet stakeholders have had interactions with both the Foundation staff and 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?”*



# Impressions of Foundation Staff and Board

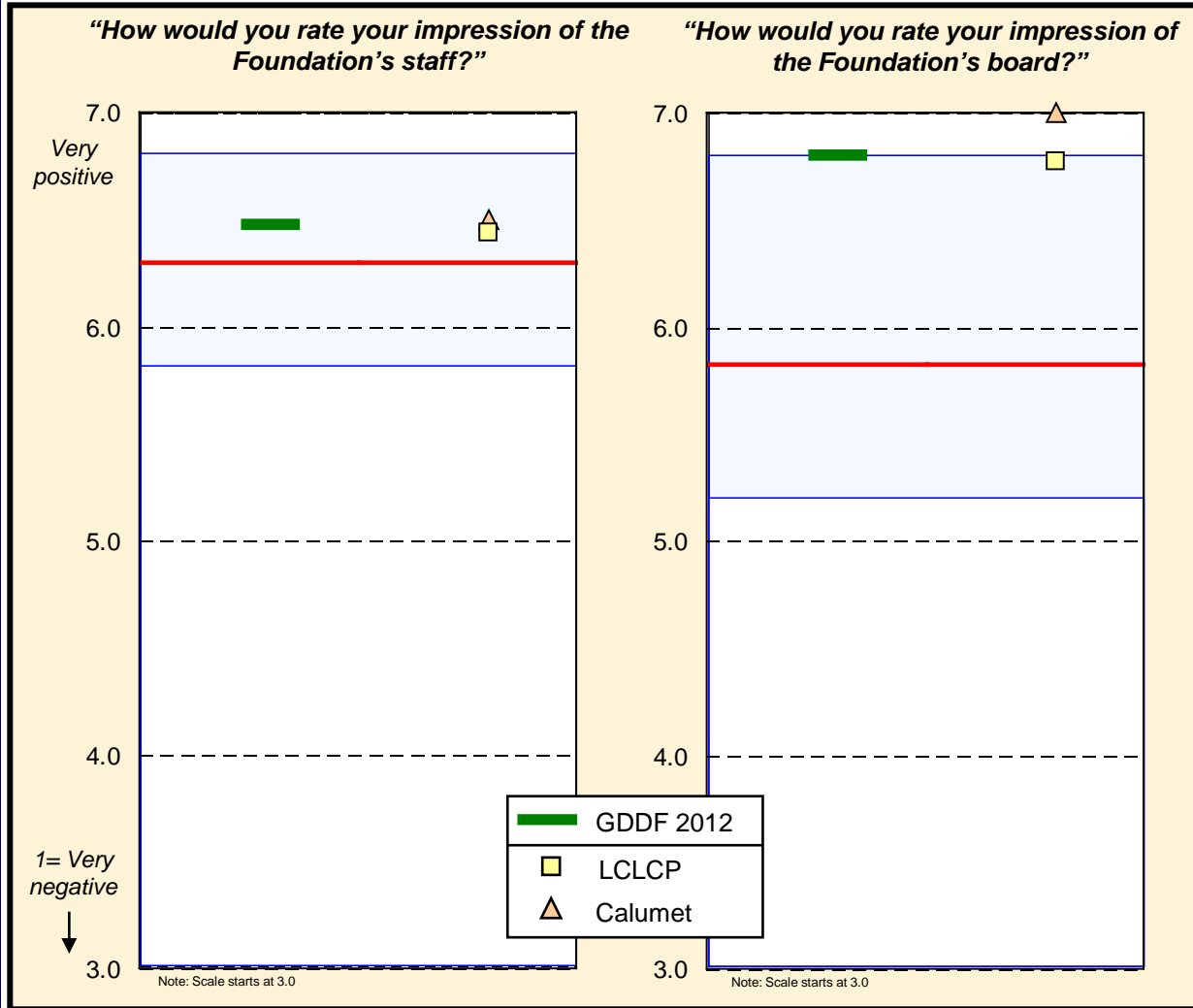
On stakeholders' impression of the Foundation's staff, Donnelley Foundation is rated:

- above the median funder

On stakeholders' impression of the Foundation's board, Donnelley Foundation is rated:

- higher than all ten other funders

## Selected Comments



## Donnelley Foundation Staff:

- “Staff is professional, engaged and knowledgeable. Most of all, staff is committed to our partnership effort.”
- “A little unnerving in that the staff (two individuals) seem overly intense or perhaps overly judgmental. That can be intimidating.”
- “They are extremely professional and good at what they do.”
- “I find the staff very helpful, thoughtful and knowledgeable. They bring conservation and organizational expertise to many different areas of our work, and are always professionals and friendly.”

## Donnelley Foundation Board:

- “Board is passionate and interested in the partners’ work and success in Lowcountry conservation.”
- “Great advocate for the Foundation. Instrumental in getting the Foundation involved with our projects and obtaining resources.”

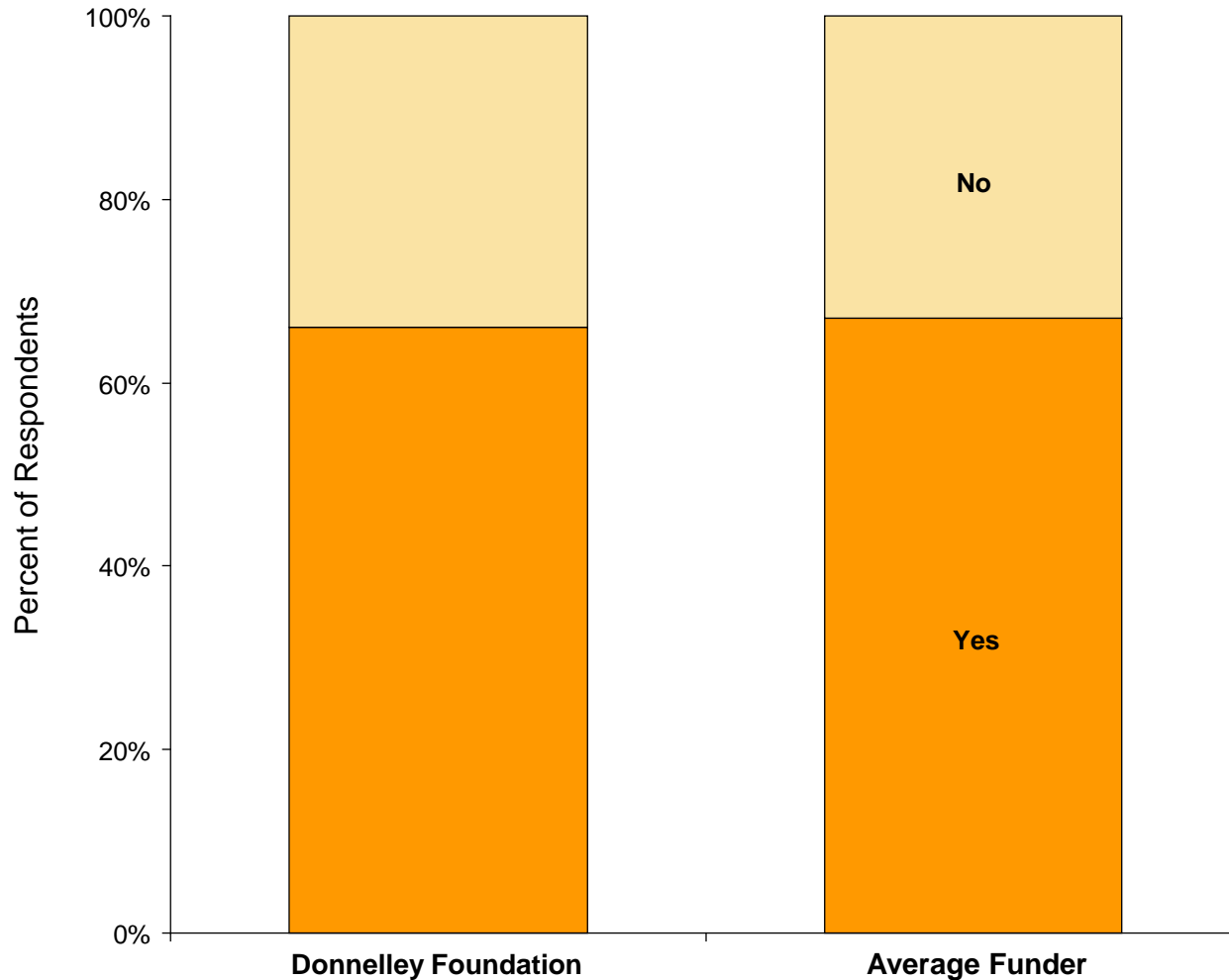
Note: Left-hand chart includes data from 12 funders. Right-hand chart includes data from 11 funders. These questions were only asked of stakeholders who reported interacting with a Foundation staff and/or board member within the last year (n=40).

# Initiating Contact with the Foundation (1)

The proportion of Donnelley Foundation stakeholders that report initiating contact with staff at the Foundation in the last year is:

- similar to that of the average funder

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

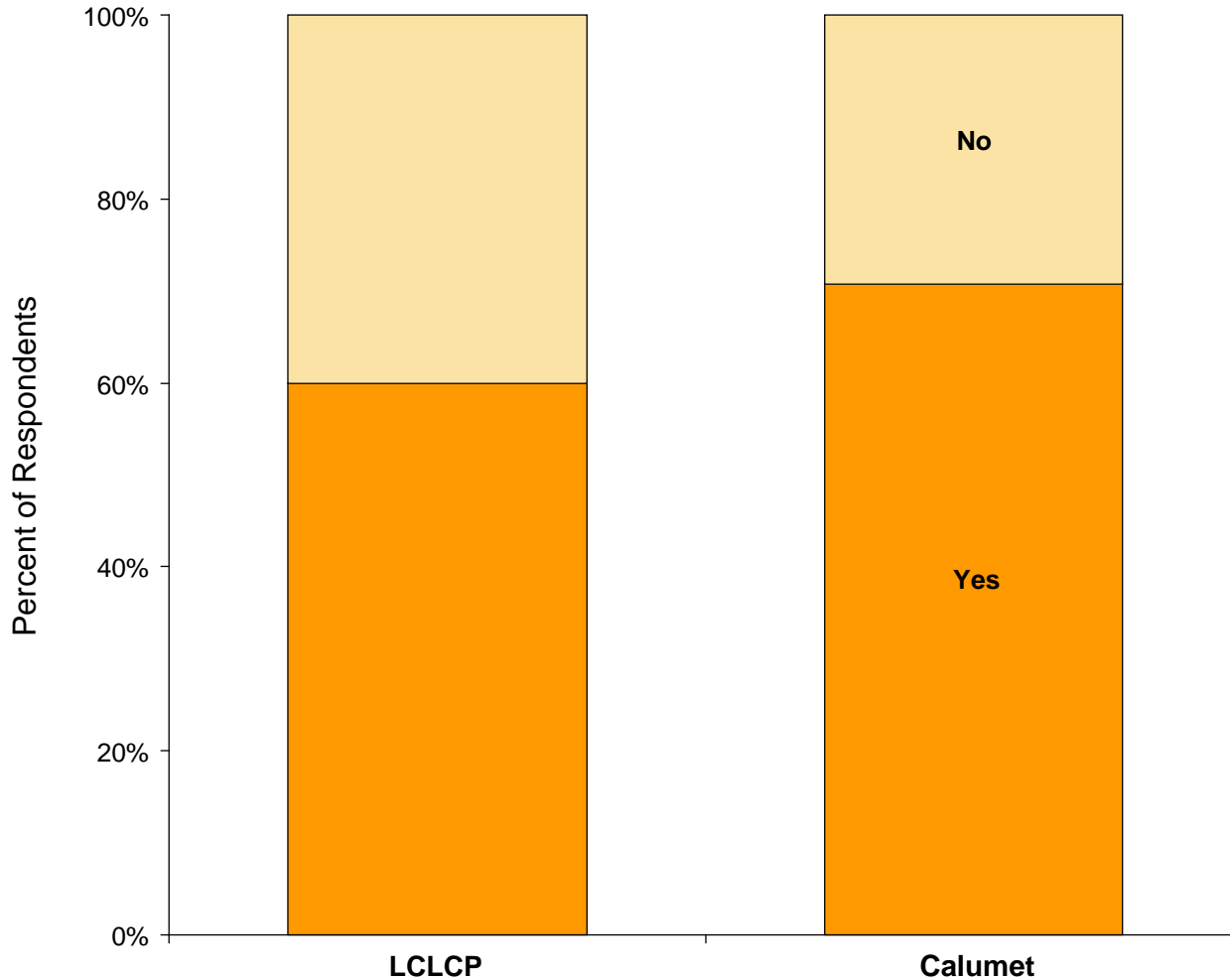


Note: Chart includes data from 14 funders.

# Initiating Contact with the Foundation (2)

The proportion of Calumet stakeholders that report initiating contact with staff at the Foundation in the last year is greater than the proportion of LCLCP stakeholders who have initiated contact with staff.

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



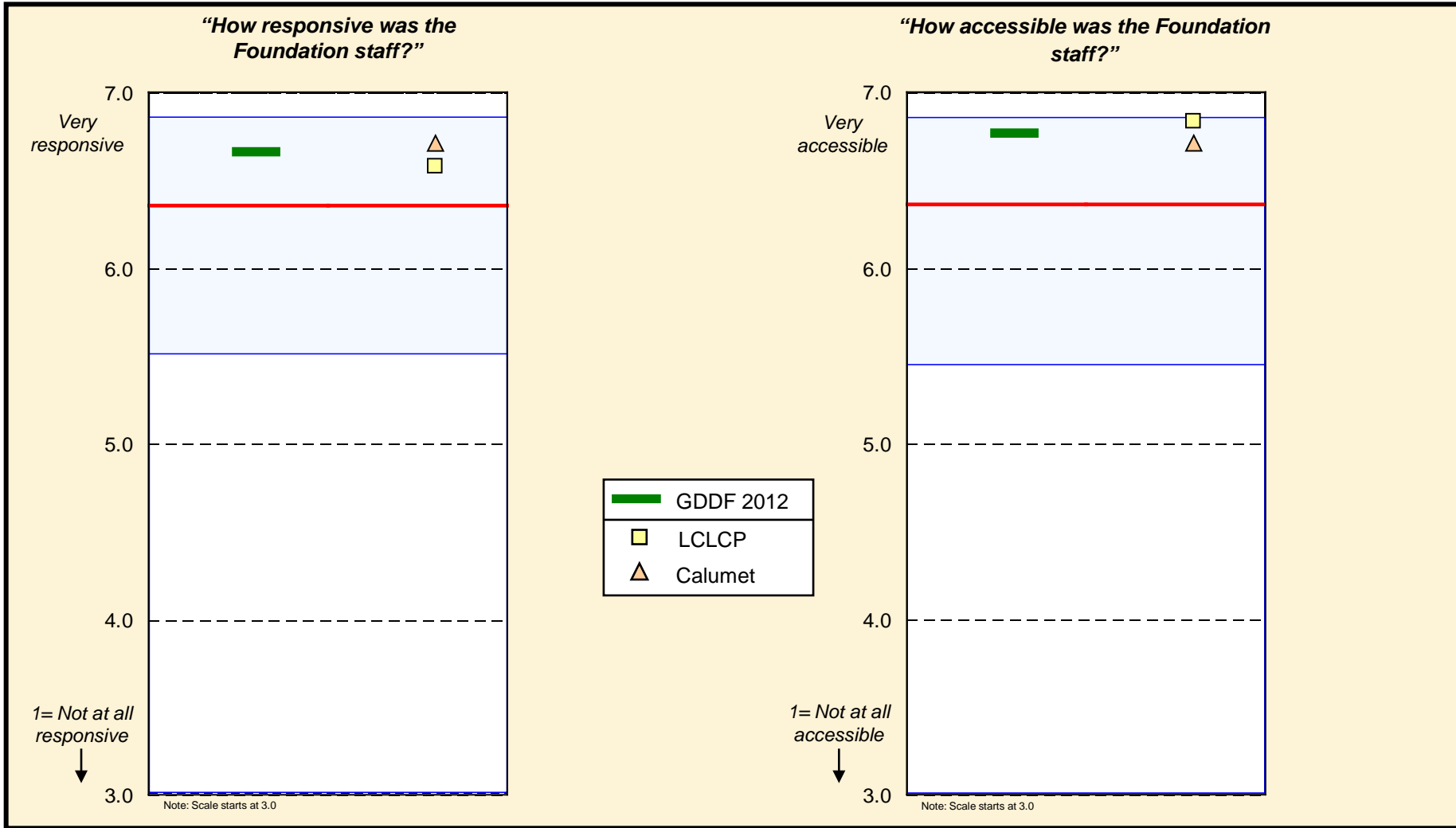
# Impressions of Interactions with Staff

On the responsiveness of its staff, Donnelley Foundation is rated:

- above the median funder

On the accessibility of its staff, Donnelley Foundation is rated:

- above the median funder



# Contents

|                     |  |           |
|---------------------|--|-----------|
| I.                  | Executive Summary  | 2         |
| II.                 | Introduction   | 4         |
| III.                | Overall Impressions of the Foundation                                    | 9         |
| IV.                 | Foundation's Goals and Strategies  | 13        |
| V.                  | Stakeholder Communication with the Foundation                            | 23        |
| VI.                 | Stakeholder Interactions with the Foundation                             | 33        |
| <b>VII.</b>         | <b>Foundation Strengths, Weaknesses, and Suggestions for Improvement</b> | <b>40</b> |
| VIII.               | Review of Findings   | 44        |
| IX.                 | Analysis and Discussion  | 46        |
| <br><u>Appendix</u> |  |           |
| A.                  | Demographics   | 52        |
| B.                  | About the Center for Effective Philanthropy                              | 55        |



# Strengths of the Foundation

Stakeholders were asked to comment about the two greatest strengths of the Foundation. A total 40 stakeholders mentioned 79 strengths. The largest proportion of comments indicated that the Foundation's focus is its greatest strength.

*"What are the Foundation's two greatest strengths?"*

| Topic of Stakeholder Comment   | % of Stakeholders Citing Strength | Sample Stakeholder Comments   |
|--------------------------------|-----------------------------------|---|
| Focus                          | 37%                               | <i>"A strong passion for rural South Carolina." "Focused agenda."<br/>"Scale at which they work."</i>   |
| Leadership/Staff               | 22%                               | <i>"Collaborative approach." "Leadership."</i>  |
| Funds                          | 17%                               | <i>"Financial resources." "Level of care given to how they spend."<br/>"Strategic funding."</i>   |
| Effectiveness                  | 12%                               | <i>"Sustained commitment to the Calumet region has helped move forward important conservation outcome for the Calumet region."<br/>"Effective." "Willingness to innovate in making grants that reduce bureaucratic burdens and allow the conservation partners to spend their limited resources in a more flexible and effective manner that produces great results."</i> |
| Reputation and Influence       | 5%                                | <i>"Ability to work across state lines, funding and leading work in the landscape." "Reputation."</i>   |
| Knowledge                      | 4%                                | <i>"Understanding of issues." "Knowledge." "Subject matter knowledge." "The knowledge and expertise of their staff."</i>  |
| Ability to Convene/Connections | 4%                                | <i>"Connection with organizations in the region." "Bringing people together for a common goal."</i>   |

# Weaknesses of the Foundation

Stakeholders were asked to comment about the two greatest weaknesses of the Foundation. A total of 24 stakeholders mentioned 36 weaknesses. The largest proportion of comments indicated that the limitations of the Foundation’s grantmaking and resources are its greatest weaknesses.

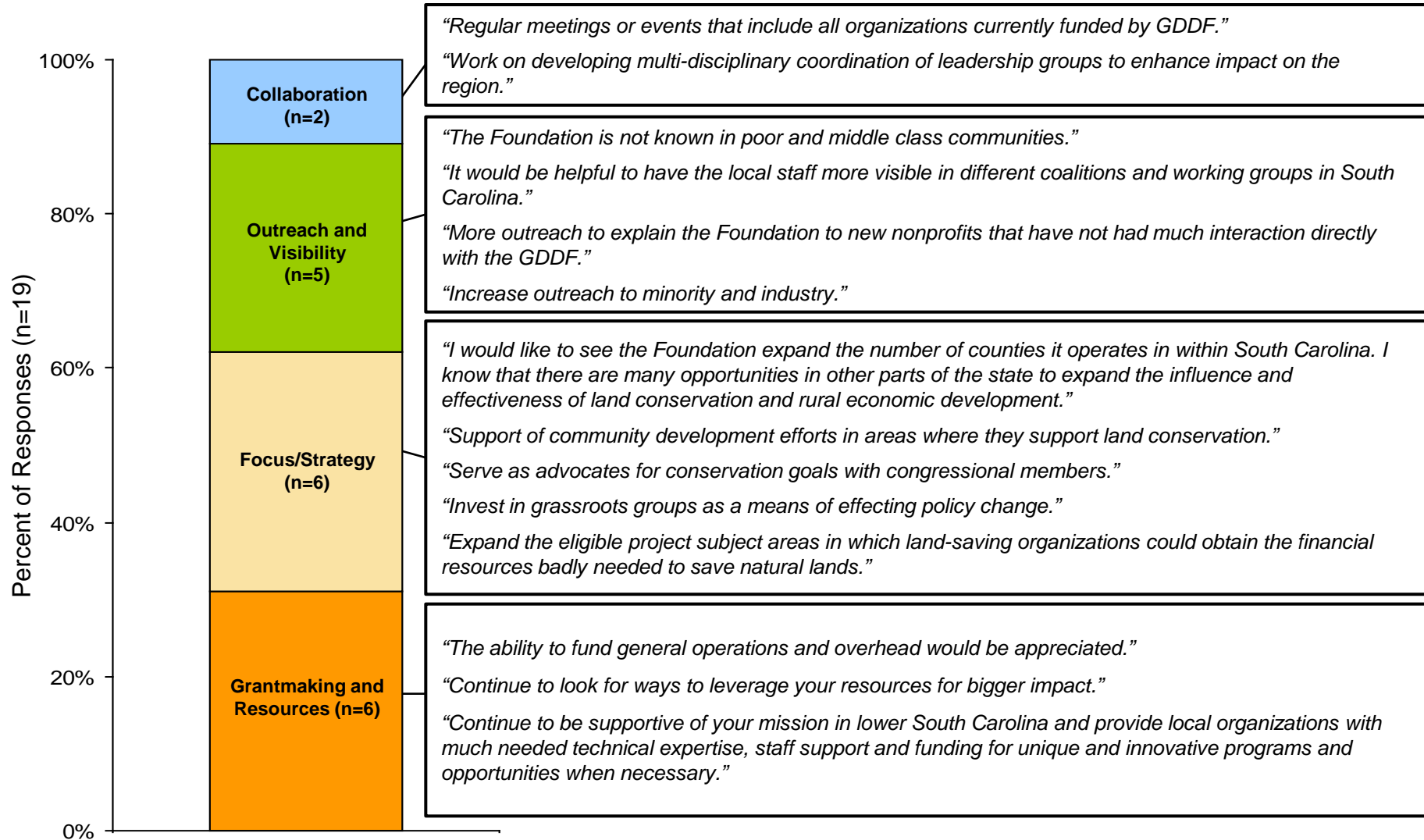
*“What are the Foundation’s two greatest weaknesses?”*

| Topic of Stakeholder Comment | % of Stakeholders Citing Weakness | Sample Stakeholder Comments  |
|------------------------------|-----------------------------------|--|
| Grantmaking/<br>Resources    | 42%                               | <i>“Perhaps spread too thin.”</i><br><i>“Limitations on general operating support.”</i><br><i>“Not enough staff in the field.”</i><br><i>“Lack of capacity for inclusive processes.”</i>   |
| Strategy                     | 31%                               | <i>“Hiring developers to serve as facilitators.”</i><br><i>“Relative geographic remoteness from NW Indiana.”</i><br><i>“At times there is confusion about the role of the Foundation as funder versus program implementers.”</i> |
| Outreach and Visibility      | 25%                               | <i>“GDDF needs to promote itself more.”</i><br><i>“Low visibility.”</i><br><i>“Lack of publicity.”</i>   |
| Leadership/<br>Staff         | 3%                                | <i>“Staff turnover.”</i>   |

# 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 and resources or the Foundation’s focus and strategy.

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



Note: Comparative data not available due to variation by foundation.

|                     |   |           |
|---------------------|---|-----------|
| I.                  | Executive Summary   | 2         |
| II.                 | Introduction  | 4         |
| III.                | Overall Impressions of the Foundation                             | 9         |
| IV.                 | Foundation's Goals and Strategies                                 | 13        |
| V.                  | Stakeholder Communication with the Foundation                     | 23        |
| VI.                 | Stakeholder Interactions with the Foundation                      | 33        |
| VII.                | Foundation Strengths, Weaknesses, and Suggestions for Improvement | 40        |
| <b>VIII.</b>        | <b>Review of Findings</b>   | <b>44</b> |
| IX.                 | Analysis and Discussion   | 46        |
| <br><u>Appendix</u> |   |           |
| A.                  | Demographics  | 52        |
| B.                  | About the Center for Effective Philanthropy                       | 55        |

# Review of Findings

| Indicator  | Average Rating           |   |   |   |                      | Survey Question   |
|--|--------------------------|---|---|---|----------------------|---|
|  | 3 ← 1= Strongly negative | 4 | 5 | 6 | 7= Strongly positive |   |
| 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 Staff <sup>1</sup>                |                          |   |   |   |                      | "How would you rate your impression of the Foundation's staff?"   |
| Impressions of Board <sup>2</sup>                |                          |   |   |   |                      | "How would you rate your impression of the Foundation's board?"   |

Note: Scales start at 3.0



1: Includes data from 12 funders.  
2: Includes data from 11 funders.

|            |   |           |
|------------|---|-----------|
| I.         | Executive Summary   | 2         |
| II.        | Introduction  | 4         |
| III.       | Overall Impressions of the Foundation                             | 9         |
| IV.        | Foundation's Goals and Strategies                                 | 13        |
| V.         | Stakeholder Communication with the Foundation                     | 23        |
| VI.        | Stakeholder Interactions with the Foundation                      | 33        |
| VII.       | Foundation Strengths, Weaknesses, and Suggestions for Improvement | 40        |
| VIII.      | Review of Findings  | 44        |
| <b>IX.</b> | <b>Analysis and Discussion</b>                                    | <b>46</b> |

## Appendix

|    |   |    |
|----|---|----|
| A. | Demographics                                | 52 |
| B. | About the Center for Effective Philanthropy | 55 |

# Areas for Discussion (1)

## Consistently Positive Perceptions of Gaylord and Dorothy Donnelley Foundation

Stakeholders have very positive perceptions of Gaylord and Dorothy Donnelley Foundation and consistently rate above the median funder for every measure in the survey, including its favorability and the extent to which the Foundation is innovative and has advanced the state of knowledge in the field. A higher than typical proportion of Donnelley Foundation stakeholders utilize in-person contact with the Foundation as their primary source of information regarding the Foundation's goals and strategy, and stakeholders rate the staff's responsiveness and accessibility higher than the typical funder. Stakeholders view Foundation staff as partners in their conservation efforts, and comment that "staff is committed to our partnership effort" and "very interested...to work with our group." Stakeholders also describe staff as "knowledgeable, friendly, and committed to doing good work" and "a great resource in helping diverse players to work together and understand our shared goals."

Donnelley's very strong ratings should be considered in the context of the population of stakeholders it chose to survey. Sixty four percent of Donnelley stakeholders (versus 49 percent at the median foundation) indicate they are "very familiar" with Donnelley Foundation; this finding may be unsurprising given the comparatively small number of stakeholders surveyed for this report (64 versus the median of 250 in the typical CEP stakeholder survey). Across funders in CEP's dataset, familiar stakeholders rate significantly higher on many measures in the survey. However, when compared to very familiar stakeholders at other Foundations, Donnelley Foundation's very familiar stakeholders rate significantly higher on most measures in the survey. Similarly, stakeholders who are "very familiar" with Donnelley Foundation rate their understanding of the Foundation's goals and strategy, as well as the Foundation's ability to advance the state of knowledge and innovate in the field, significantly higher than less familiar stakeholders.

## Areas for Discussion (2)

### Consistently Positive Perceptions of Gaylord and Dorothy Donnelley Foundation (cont.)

Many Donnelley stakeholders are former grantees; a higher than typical proportion of stakeholders indicate that they have received funding from the Foundation in the past (68 percent versus 53 percent at the median foundation) and just 19 percent have applied for and been declined funding from Donnelley Foundation. Compared to other Donnelley stakeholders, those who were formerly grantees rate the Foundation significantly higher for their understanding of the Foundation's goals and strategy, the extent to which the Foundation is innovative, and the credibility of information provided by the Foundation. One stakeholder praises their multidimensional relationship with the Foundation, writing "we could not have a more effective partner and funder."

- *To the extent that the stakeholders Donnelley chose to survey are the critical partners for the achievement of its goals, these results are reinforcing. These stakeholders are very positive about the Foundation's work. Has the Foundation considered whether there is a somewhat broader group of stakeholders who are less familiar with the Foundation that might be important to the Foundation and be open to further engagement?*
- *Has Donnelley Foundation distilled and documented the particular staff practices and philosophies that it believes result in their high quality and utility for stakeholders? How can the Foundation maintain these aspects moving forward?*



# Areas for Discussion (3)

## Opportunities for Greater Publicity

Donnelley Foundation stakeholders rate the Foundation's effect on public policy and advancement of knowledge in their fields to be higher than typical; however, several stakeholders suggest the Foundation could improve its outreach and visibility. When asked about the credibility of information received from the Foundation, stakeholders rate Donnelley Foundation above 94 percent of funders in CEP's dataset. But stakeholders wish the knowledge provided by the Foundation could be more publicly disseminated – many stakeholders (9 of 24) cite the Foundation's "lack of publicity" and "low visibility" as its biggest weakness.

When asked to provide suggestions for improvement, stakeholders note that "it would be helpful to have the local staff more visible" and would like "more outreach to explain the Foundation to new nonprofits that have not had much interaction directly with the GDDF." Some stakeholders express difficulty gauging the Foundation's effectiveness, commenting, "I can't point to any example of the success on the second goal of rural development," perhaps owing to the challenging nature of measuring achievement of conservation strategies. CEP's research – as described in *Essentials of Foundation Strategy* – has found that more strategic foundation leaders tend to publicly communicate their strategies. Donnelley stakeholders express the desire for the Foundation to widely disseminate and advocate for its mission, noting that it's "very important to have someone articulate the protection, stewardship, and engagement goals at the regional scale."

Stakeholders indicate the desire for more publications and tangible resources covering the Foundation's work. For example, one would like "a publication that lists [the percentage of increases in land conservation]." Calumet stakeholders found the *Chicago Wilderness* magazine Calumet issue to be one of the most helpful resources for learning about the Foundation and supporting their organization's work and one comments that it "could be time for another reprint of that."

- *What role does publicity about the Foundation's work play in Donnelley Foundation's strategy? Do opportunities exist for the Foundation to communicate more broadly about its work in both South Carolina and the Calumet region?*
- *Given positive perceptions regarding the Foundation's knowledge leadership and effect on public policy, can the Foundation identify what enabled past successes and build on these strengths even in a moment of new leadership?*

# Areas for Discussion (4)

## The Foundation's Choice of Goals and Strategy are a Strong Point

Most stakeholders view the specificity and unique focus of Donnelley Foundation's goals and strategies as strengths, and they rate their understanding of those goals and strategies higher than typical. When it comes to the Foundation's greatest perceived strengths, 38 percent of stakeholder comments cited its focus (mentioned 31 times by stakeholders). Furthermore, 93 percent of Donnelley stakeholders believe the Foundation has chosen the right goals. Stakeholders recognize the value of Donnelley's targeted goals, commenting that a "narrow focus is important to show meaningful, measurable results. This is not all that common in the foundation world!" Others appreciate the Foundation's concentration "on sufficiently small land areas [in order] to have reasonable prospects of accomplishing significant goals."

While many stakeholders laud the Foundation for its local and regional focus, a few wish the Foundation could spread its successful strategy and take a wider approach to conservation. When asked to provide suggestions for improvement, one stakeholder would like the Foundation to "expand the number of counties it operates in within South Carolina...[and] expand the influence and effectiveness of land conservation and rural economic development." Another stakeholder expresses frustration with seemingly "arbitrary county boundaries...I wouldn't let the state boundary prohibit the Foundation from working across the border if it is necessary to accomplish the Foundation's goals on the South Carolina side." Some stakeholders wish the Foundation could take a more "holistic" route and try to "balance economic development with environmental protection and preservation."

When asked about the extent to which the Foundation is innovative, stakeholders rate Donnelley Foundation above all other funders in CEP's dataset. Stakeholders note that "their recent investments have been strategic and impactful" and praise the Foundation for its "willingness to innovate" and "ability to see the role for non-traditional players to be part of conservation."

# Areas for Discussion (5)

## Different Groups of Stakeholders Have Different Experiences with and Perceptions of the Foundation

CEP surveyed stakeholders of the Foundation's Low Country Land Conservation Partnership (LCLCP) and Calumet initiatives; these two groups of stakeholders perceive the Foundation's impact and effectiveness differently. LCLCP stakeholders rate their overall favorability impression of the Foundation significantly higher, and view the Foundation's effect on public policy, advancement of the state of knowledge in the field, and the extent to which the Foundation is innovative more positively than those in the Calumet group.

In addition to varying perceptions of the Foundation's impact and effectiveness, LCLCP and Calumet stakeholders report different patterns of interaction with the Foundation. More than half of LCLCP stakeholders report they interacted with both Foundation staff and a board member in the past year, whereas just 8 percent of Calumet stakeholders interacted with both groups. Furthermore, 17 percent of Calumet stakeholders had no interaction with the Foundation staff or board in the past year, whereas all LCLCP stakeholders participated in at least one of these forms of personal interaction. Past relationships with the Foundation also differ by stakeholder group – 25 percent of Calumet stakeholders have previously applied for and been declined funding from the Foundation, compared with only 10 percent of LCLCP stakeholders.

Stakeholders are also receiving information about the Foundation through different channels. No LCLCP stakeholders report using the Foundation's website or general media as their primary source of information about the Foundation's current goals and strategy, whereas 16 percent of Calumet stakeholders utilize one of these two resources. Additionally, more than three quarters of Calumet stakeholders used the Chicago Wilderness magazine Calumet issue to learn about the Foundation's work, and found the magazine to be more helpful than most other resources.

- *Is the variation in experiences across stakeholder type surprising to the Foundation? What might explain the variation? What are the different strategies for engaging stakeholders within each of these groups? Do these results reflect different strategies and goals for interacting with these groups?*
- *Considering the particularly strong ratings by LCLCP stakeholders, can the Foundation identify practices of the LCLCP initiative that may have contributed to these positive perceptions, and apply them across other program areas? For example, are there opportunities to provide more in-person interactions or direct communications to Calumet stakeholders?*
- *Given that Calumet stakeholders receive information from publications both by and about the Foundation, how can the Foundation ensure that such resources stay relevant and helpful?*

|       |   |    |
|-------|---|----|
| I.    | Executive Summary   | 2  |
| II.   | Introduction  | 4  |
| III.  | Overall Impressions of the Foundation                             | 9  |
| IV.   | Foundation's Goals and Strategies                                 | 13 |
| V.    | Stakeholder Communication with the Foundation                     | 23 |
| VI.   | Stakeholder Interactions with the Foundation                      | 33 |
| VII.  | Foundation Strengths, Weaknesses, and Suggestions for Improvement | 40 |
| VIII. | Review of Findings  | 44 |
| IX.   | Analysis and Discussion   | 46 |

## Appendix

|           |   |           |
|-----------|---|-----------|
| <b>A.</b> | <b>Demographics</b>                         | <b>52</b> |
| B.        | About the Center for Effective Philanthropy | 55        |

# Stakeholder Demographics (1)

| Measure                                      | Donnelley Foundation | Full Dataset Average |
|--|----------------------|----------------------|
| <b>Stakeholder Organization Type</b>         |                      |                      |
| Nonprofit                                    | 55%                  | 56%                  |
| State Government                             | 7%                   | 12%                  |
| Business                                     | 5%                   | 6%                   |
| Foundation                                   | 5%                   | 7%                   |
| Local Government                             | 9%                   | 4%                   |
| Nonprofit Support                            | 9%                   | 3%                   |
| Media  | 0%                   | 1%                   |
| National Government                          | 5%                   | 2%                   |
| Other  | 7%                   | 8%                   |
| <b>Organizational Scope</b>                  |                      |                      |
| Local  | 44%                  | 30%                  |
| State-wide                                   | 16%                  | 34%                  |
| Regional                                     | 21%                  | 10%                  |
| National                                     | 19%                  | 26%                  |
| <b>Past Funding Recipient</b>                |                      |                      |
| Yes  | 68%                  | 53%                  |
| No   | 32%                  | 43%                  |
| Don't know                                   | 0%                   | 4%                   |
| <b>Previously Declined Funding Applicant</b> |                      |                      |
| Yes  | 19%                  | 25%                  |
| No   | 65%                  | 63%                  |
| Don't know                                   | 16%                  | 12%                  |

# Stakeholder Demographics (2)

| Measure                                   | Donnelley Foundation | Full Dataset Average |
|---|----------------------|----------------------|
| <b>Knowledge of the Foundation</b>        |                      |                      |
| Less than one year                        | 0%                   | 3%                   |
| 1 year or more but less than 3 years      | 7%                   | 13%                  |
| 3 years or more but less than 5 years     | 23%                  | 19%                  |
| More than 5 years                         | 70%                  | 65%                  |
| <b>Race/Ethnicity</b>                     |                      |                      |
| African-American/Black                    | 12%                  | 7%                   |
| American Indian or Alaska Native          | 0%                   | 0%                   |
| Asian (including the Indian subcontinent) | 0%                   | 1%                   |
| Caucasian/White                           | 79%                  | 79%                  |
| Hispanic/Latino                           | 2%                   | 5%                   |
| Multi-racial                              | 5%                   | 2%                   |
| Pacific Islander                          | 0%                   | 0%                   |
| Other                                     | 0%                   | 1%                   |
| Prefer not to say                         | 2%                   | 5%                   |
| <b>Gender<sup>1</sup></b>                 |                      |                      |
| Female                                    | 33%                  | 49%                  |
| Male                                      | 64%                  | 48%                  |
| Other                                     | 0%                   | 0%                   |
| Prefer not to say                         | 2%                   | 3%                   |

1: In Spring of 2009 CEP removed the word "optional" from this question but added an "other" response choice and a "prefer not to say" response choice. Previously this question was only infrequently skipped and so we have maintained comparative data in spite of the question change. Proportions may not sum to 100 percent due to rounding.

# Contents

|           |   |           |
|-----------|---|-----------|
| I.        | Executive Summary   | 2         |
| II.       | Introduction  | 4         |
| III.      | Overall Impressions of the Foundation                             | 9         |
| IV.       | Foundation's Goals and Strategies                                 | 13        |
| V.        | Stakeholder Communication with the Foundation                     | 23        |
| VI.       | Stakeholder Interactions with the Foundation                      | 33        |
| VII.      | Foundation Strengths, Weaknesses, and Suggestions for Improvement | 40        |
| VIII.     | Review of Findings  | 44        |
| IX.       | Analysis and Discussion   | 46        |
| <br>      |   |           |
|           | <u>Appendix</u>   |           |
| A.        | Demographics  | 52        |
| <b>B.</b> | <b>About the Center for Effective Philanthropy</b>                | <b>55</b> |

## 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.**



# 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
- **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
- **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
- **Strategy Landscape Tool (SLT):** an online interactive visualization tool, developed by Monitor Institute and delivered with CEP, that allows users to easily see and understand grantmaking strategies and patterns within and across institutions so they can make better decisions in pursuit of their goals.

# Contact Information

- ◆ This report was produced for Gaylord and Dorothy Donnelley Foundation by the Center for Effective Philanthropy in January, 2013.
  
- ◆ Please contact CEP if you have any questions:
  - Amber Bradley, Manager  
(617) 492-0800 x251  
amberb@effectivephilanthropy.org
  
  - Emily Giudice, Research Analyst  
(617) 492-0800 x281  
emilyg@effectivephilanthropy.org