Fifteen Years of Philanthropic Leadership: A Summative Evaluation of the Marguerite Casey Foundation

Final Report

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Executive Summary

Established in October 2001, the Marguerite Casey Foundation (Foundation) has been in the forefront of movement building to transform the lives of poor families and children. Its evolution has occurred in two overlapping and interconnected phases described here as organizational development and movement building. Regarding organizational development, the Foundation has:

- Established its mission, vision, and an overall strategy—Equal Voice;
- Developed innovative grantmaking guidelines that include general, long-term funding to support cornerstone organizations working across issues, races and ethnicities, regions and egos to bring about change that improves the social and economic well-being of families;
- Evolved its theory of change, highlighting the importance of the overlapping strategies of communications and grantmaking to achieve the Foundation’s goals; and
- Identified five indicators of movement building progress within the Equal Voice framework to guide its evaluations.

Additional progress has focused on movement building. Specifically, the Foundation has:

- Developed the Equal Voice National Family platform, a comprehensive agenda for policy change, with the guidance and input of tens of thousands of low-income families;
- Built 13 regional Equal Voice networks and one national Equal Voice network by providing support for network weavers;
Developed a communications strategy and infrastructure that is synthesized with grantmaking to advance the Foundation’s mission; and

Launched an independent, family-led membership organization, Equal Voice Action, to further advance its efforts.

Now, embarking on its 15th year, the Foundation is entering a new phase of possibilities at a time when the prevalence of poverty and the risks associated with economic insecurity are increasing. This summative evaluation was commissioned by the Foundation to mark this milestone, facilitate reflection on lessons learned, and provide recommendations for future work. Drawing on secondary sources, interview and survey data gathered from Marguerite Casey Foundation leaders and staff, network weavers, and current and former grantees, the report describes the Foundation’s practices and impact as well as key areas of consideration for its continued and future work.

Summary of Key Findings

Qualitative interviews and surveys generated several key findings as described below.

1) Foundation leaders and staff, and network weavers identified three main themes characterizing the Foundation and its overall performance.

- Participants identified mission, collaboration, diversity, and support as key elements of the Foundation’s organizational climate positively influencing their professional activities, engagement, and satisfaction.

- Participants favorably viewed grantees and the Foundation’s support of grantees’ work, especially the long-term general funding and the “ask, listen, act” brand promise.
Participants identified several significant accomplishments and areas of impact that have moved the Foundation closer to its goal of establishing a transformative movement of poor families. These were described as: 1) policy impact at the state and local levels; 2) network development; 3) leadership development; 4) strategic communications; 5) the incubation and launch of a membership organization; and 6) influence on the field of philanthropy.

2) Current grantees’ perceptions were exceedingly positive and supportive of the Foundation’s mission, staff, and strategies, although slight differences in the responses of some grantees were found.

- Current grantees overwhelmingly value and share the Foundation’s mission and goals, appreciate the responsiveness and knowledge of its personnel, and view the organization as trustworthy.

- Current grantees recognize and value the multi-faceted support provided by the Foundation. Specifically, grantees appreciate the Foundation’s financial support and its assistance with capacity building and increasing the visibility of their work.

- Current grantees’ perceptions of the Equal Voice strategy are largely positive. However, responses from a small group suggest the need for additional or clarifying information about the different strategies and tactics that share the Equal Voice brand.

- Generally, two factors–length of time receiving funding from the Foundation and identification as a “National” grantee–significantly influenced grantee responses. Although not surprising, these results suggest areas for further exploration.
**Recommendations for Continued and Future Work**

Based on the evaluation’s findings, the following five areas are recommended for continued and future work.

- **Leadership Changes and Transitions** - The Foundation will face changes in its core leadership, which may present new and profound challenges for the organization. How these changes and transitions are managed will determine the Foundation’s future progress.

- **Foundation/Grantee/Network Weaver Relationships** - While valuing the current support provided by the Foundation, several grantees and network weavers requested additional assistance with communications and more frequent contact with program officers and other Foundation staff.

- **Communications** - To further advance the Foundation’s communications strategy, participants identified three areas for continued and future work: build the capacity of grantees and networks to better craft and communicate their “stories”; review messaging to ensure common understanding of the Equal Voice brand; and identify communications tactics to broaden the Foundation’s audience and advance its agenda.

- **Evaluation** - The Foundation’s current evaluation efforts may be further enhanced by focusing on strategies to measure its influence on the field of philanthropy and integrating a variety of methods in the assessment process.

- **Funding Strategies and Priorities** - As the Foundation seeks to enhance its impact in the decades to come, funding strategies and priorities are recommended issues for future deliberation.
Conclusion

In its first 15 years, the Marguerite Casey Foundation has achieved substantial progress in the interconnected areas of organizational development and movement building. These accomplishments embody key elements to movement building that have created the conditions necessary for the Foundation’s broader impact. Continuous improvement in the recommended areas will enable the Foundation to extend and deepen its influence on the lives and communities of poor families for years to come.
Fifteen Years of Philanthropic Leadership: A Summative Evaluation of the Marguerite Casey Foundation

Introduction

Traveler, there is no road.
Traveler, you make the road by walking.

Caminante, no hay camino,
se hace camino al andar.

- Antonio Machado

Established in October 2001, the Marguerite Casey Foundation (Foundation) has been in the forefront of movement building to transform the lives of poor families and children. Its evolution has occurred in two overlapping and interconnected phases described here as organizational development and movement building. Organizational development involved establishing and refining the Foundation’s structure, mission, vision and strategic approach; grantmaking guidelines; and theory of change. These key organizational elements have undergirded and guided the Foundation’s efforts to build a movement that supports poor families to become change agents in their communities and the larger society. Now, embarking on its 15th year, the Foundation is entering a new phase of exciting possibilities.

This summative evaluation was commissioned by the Foundation to mark this milestone, facilitate reflection on lessons learned, and provide recommendations for future work. It is organized into five sections. It first describes the current dimensions of poverty in the United States to establish a context for the Foundation’s work. It then provides an overview of the Foundation’s organizational features and movement building strategy. A description of the methods used in this summative evaluation follows. Drawing on the perspectives and voices of
key stakeholders including Foundation leaders and staff, network weavers, and current and former grantees, the fourth section describes the Foundation’s practices and impact. This section includes two parts. The first part discusses key themes that emerged from qualitative interview and survey data collected from Foundation leaders and staff, and network weavers. Drawing on quantitative and qualitative survey data and grantee profiles, the second part discusses the characteristics and perceptions of current and former grantees. The final section presents a synthesis of the study’s findings and their implications for the Foundation’s continued and future work.
Children, Families, and Poverty in the United States

In 2014, the official national poverty rate was 14.8 percent; 46.7 million people lived in poverty.¹ A disproportionate percentage of the poor are children and adolescents under the age of 18 (21%); in fact, the recent recession raised the nation’s proportion of poor children to one of the highest recorded in the last half century.² While poverty affects all racial and ethnic groups in the United States, poor children are disproportionately African American, Native American, and Latino/Hispanic. Compared to only 12 percent of European American or Asian children, about 38 percent of African American children, 35 percent of Native American children, and 32 percent of Latino/Hispanic children live at or below the poverty threshold,³ which is $24,000 for a family of four.⁴ Significantly, about 50 percent of poor families live in “severe poverty” with incomes less than half the federal poverty threshold.⁵

Of equal concern are families that are near poverty, recently described as the “missing class,”⁶ with incomes between 100 and 200 percent of the poverty threshold. Sociologists, Katherine Newman and Victor Chen, estimated that there are nearly twice as many families near poverty than those below the poverty threshold. Although they ostensibly symbolize the promise of the American dream, these families, “… truly are one paycheck, one lost job, one divorce or one sick child away from falling below the poverty line.”⁷

Economic insecurity creates housing hardships for many families, increasing rates of residential and school mobility and homelessness.⁸ It is also associated with food insecurity.

¹ United States Census Bureau. Poverty, 2015
² Curtis Skinner, “Child Poverty by the Numbers,” 2013
³ National Center for Educational Statistics, 2014
⁴ United States Census Bureau, 2015
⁵ National Poverty Center, 2010
⁶ Newman & Chen, 2007
⁷ Ibid (p. 1)
⁸ National Center on Family Homelessness, 2014
According to the US Department of Agriculture, an estimated 14.0 percent of American households (including 32.8 million adults and 15.3 million children) were food insecure at least some time during the year in 2014, meaning they lacked access to enough food for an active, healthy life for all household members.9

Poverty is also negatively associated with health and educational outcomes. Poor persons generally experience increased rates of mortality and morbidity and decreased access to and quality of health care.10 Poor students also tend to have limited access to high quality educational opportunities, which negatively affects their academic achievement, high school completion, and college enrollment.11

While there is debate on the best strategies for philanthropic organizations to assist in the eradication of poverty in the United States,12 there is growing consensus that grantmaking foundations have a key role to play, including supporting advocacy and movement building.13 In pursuit of its goal to eliminate poverty through the empowerment of poor families, the Marguerite Casey Foundation has been at the forefront of movement building as a philanthropic strategy.14

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9 Coleman-Jensen, Rabbitt, Gregory, & Singh, 2015
10 See CDC Health Disparities and Inequalities Report — United States, 2013
12 Callahan, 2014; Berlin, 2008
Overview of the Marguerite Casey Foundation

Organizational Development

In 2001, the Marguerite Casey Foundation was established as an independent, private foundation with an initial endowment of $600 million. Since its inception, the Foundation has developed its structure; mission, vision, and strategy; grantmaking guidelines; and theory of change.

Structure. The Foundation’s organizational structure is composed of a Board of Directors (Board), a President and Chief Executive Officer (CEO), and a staff that includes four units: 1) finance and investment, 2) administration and human resources, 3) communications, and 4) grantmaking and evaluation.

The Board of Directors. The Marguerite Casey Foundation has a distinguished and diverse Board with nine members, including a Chair who provides leadership and direction. The Board’s diversity spans several dimensions including race and ethnicity, gender, age, and personal and professional experiences. Utilizing a shared governance model, the Board oversees the work of the Foundation. It is responsible for ensuring that the leadership, resources, and finances match the Foundation’s mission and vision; and monitoring its performance. The Foundation’s Board is organized into four committees (e.g., communications and advocacy, governance, finance and investment, and audit). It meets formally four times per year; a portion of each meeting takes place in the field so that Board members have an opportunity to learn from the activism of grant recipients and the families with whom they work.

The President and CEO. The Foundation’s President and CEO provides leadership in establishing and implementing guidelines, policies, and procedures for grantmaking and daily operations. In partnership with the Board, inaugural President and CEO of the Marguerite Casey Foundation, Luz Vega-Marquis, shaped the Foundation’s communications and grantmaking to:
• Support and nurture strong, vibrant activism within and among families, enabling them to advocate on their own behalf and improve the public and private systems that impact their lives;

• Examine, change and inform the advancement of social and economic policies and practices that promote the development of strong families and strong communities;

• Encourage the development of a coherent knowledge base for advocates, families and the organizations that serve them; and

• Invest in system change and cross-system change in order to generate greater knowledge and provide effective working models for practice.15

To achieve these objectives, the President and CEO works closely with the Foundation’s staff.

The staff. As stated by Phil Buchanan, President of the Center for Effective Philanthropy, “[T]he quality of staff and of staff culture matters because what happens inside a foundation’s walls ripples outside those walls.”16 Central to the Marguerite Casey Foundation’s operation is its staff of approximately 25 employees. Staff members are organized into four units focused on the following areas: 1) finance and investment, 2) administration and human resources, 3) communications and 4) grantmaking and evaluation. A leadership team, which includes the Foundation’s President and CEO, executive assistant to the President and CEO, chief financial officer, director of grantmaking and evaluation, director of communications, and director of human resources, ensures that key decisions, initiatives, and issues are thoroughly discussed, analyzed, and communicated across all areas of the Foundation. The leadership team also

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15 See Marguerite Casey Foundation website at: http://caseygrants.org/about-us/
16 See Phil Buchanan in Ethan McCoy’s Discussing the Role of Foundation Staff, Center for Effective Philanthropy, 2015 at http://www.effectivephilanthropy.org/discussing-the-role-of-foundation-staff/
guarantees that decisions and initiatives are in alignment with the Foundation’s mission, vision, and overall strategy.

**Mission, vision, and strategy.** The Marguerite Casey Foundation seeks to build a movement led by poor families who are empowered to change their communities and lives. The mission specifically states that the Foundation, “[E]xists to help low-income families strengthen their voice and mobilize their communities in order to achieve a more just and equitable society for all.” This mission serves to achieve the Foundation’s long term vision adopted in 2003:

*We imagine a just and equitable society for all, where all children are nurtured to become compassionate, responsible and self-reliant adults; where families are engaged in the life of their communities, the nation, and the world; and where people take responsibility for meeting today’s needs as well as those of future generations.*

Undergirding the Foundation’s vision are seven key values that provide a framework for its operation and development: (1) Diversity and Anti-Racism; (2) Equity; (3) Learning and Growing; (4) Mutual Respect and Trust; (5) Stewardship; (6) Sustained Connections; and (7) Transparency. These values are reflected in the Foundation’s strategic approach to change-the Equal Voice strategy.

The Equal Voice strategy reflects the Foundation’s belief that poor families can lead and sustain a movement that improves the well-being of all families. The strategy includes five components:

- Engage families to advocate on their own behalf for policy changes that improve the economic and social well-being of all families.
• Build strong cross-issue networks to share knowledge, organize constituencies of low-income families and pursue policy advocacy campaigns for change.
• Bring about change through successful policy reforms driven by low-income families.
• Develop skills and leadership among families in communities.
• Use resources to build organizations’ capacity for movement building, including financial sustainability.\(^{17}\)

These components reflect the Foundation’s recognition that to support a movement which gives visibility and voice to low-income families, organizations must work across issues, regions, races and ethnicities, and egos. The Equal Voice strategy as well as the Foundation’s mission and vision drive its grantmaking guidelines and theory of change.

**Grantmaking guidelines.** The Foundation has several grantmaking guidelines. First, it does not accept unsolicited proposals. The founding members of the Board believed that unsolicited proposals were an inefficient use of time and resources for the Foundation as well as most grant applicants.\(^{18}\) Rather, the Foundation solicits funding proposals from specific organizations that embody its mission and the Equal Voice strategy. A second guideline is that the Foundation works with cornerstone organizations in the 13 states with the highest concentrations of poverty.\(^{19}\) Cornerstone organizations are those that play a central and sustained role in the activism of poor communities. Third, the Foundation provides general and long-term funding. Through long-term general support grants, the Foundation provides organizations with the flexibility to build internal capacity and refine their programmatic strategies in response to changing conditions. The Foundation primarily awards 36-month, renewable grants in the range

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\(^{17}\) Personal communication, Cheryl Milloy, July 2016.
\(^{18}\) Marguerite Casey Foundation, *Paving a Road of Hope*.
\(^{19}\) The Foundation has also established a “National” funding category to support organizations whose work with poor families is national in scope.
of $300,000, although smaller grants over shorter time frames are also provided. Fourth, the Foundation follows a three-step process of grantee engagement and continuous improvement, which has become its brand promise—“ask, listen, act” (see Figure 1). That is, in realizing its mission, the Foundation readjusts its work as it asks questions of grantees and families, listens to their responses, and then acts on them. This process was first manifested and refined during the Foundation’s 2002 listening circles as described below. Finally, the Foundation takes a “non-siloed” or integrated approach to funding, seeking to bring grantees together “across traditional barriers of geography, ethnicity, culture—and issues.”

This approach recognizes that the issues facing poor families are not discrete but interconnected, requiring comprehensive and inclusive action. The Foundation’s grantmaking guidelines are best understood within its theory of change, which has evolved alongside the organization.

Figure 1. The Marguerite Casey Foundation’s Brand Promise

**Theory of change.** The Foundation first developed a theory of change in 2005, and subsequently revised it in 2007. The Foundation’s most recently updated (2014) theory of change was the result of an interactive process that incorporated feedback from key stakeholders and guidance from experts in the field of organizational assessment. The updated theory of change depicts the causal chain linking Foundation resources, core strategies, and anticipated outcomes.

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Important elements include the Foundation’s brand promise and its long-time commitment to using a racial equity lens to guide its work. At the center of the theory are the Foundation’s overlapping strategies of grantmaking and communications. This overlap reflects the Foundation’s commitment to communications and grantmaking as equally relevant to movement building.\(^{21}\) It is also informed by the knowledge that media representations of and information about poor families have a direct influence on public attitudes and beliefs, and ultimately the policies that grantees seek to influence.\(^{22}\) The updated theory of change provides a roadmap for evaluating the Foundation’s processes and progress toward building a movement that elevates the voices of poor families.

**Movement Building**

In July 2002, the Foundation prepared for its first year of grantmaking by commissioning 40 papers from practitioners, interviewing experts in the field of child welfare, and conducting listening circles in six cities. These cities—Los Angeles, CA; Baltimore, MD; Mobile, AL; Rapid City, SD; El Paso, TX; and Yakima, WA—were chosen to reflect a diversity of regional, generational, cultural, ethnic, and socioeconomic perspectives. Each listening circle was attended by an average of 100 participants including community organizers and advocates, and representatives from government agencies and higher education institutions. Participants were asked the same questions posed to the practitioners and child welfare experts: What creates strong families and children? What would it take to change the child welfare system and other systems that have an impact on the lives of families and children? How would you leverage $30 million a year to ensure the well-being of children, families and communities? Findings from


\(^{22}\) See for example, Bullock, Heather E., Karen Fraser Wyche, and Wendy R. Williams, "Media images of the poor," 2001.
these activities helped to shape the Foundation’s Equal Voice strategy as a means “to keep families intact…and help grassroots organizations.”

In 2005, the Foundation commissioned additional research in the form of a survey of 1,500 families with children under 18, the majority of whom were living below, at, or near the federal poverty threshold. The survey revealed that the overwhelming majority of participating families were uncertain how to address the economic marginalization that they understood to be structural. This finding further underscored the need to provide resources to support grantees in empowering and mobilizing disengaged families. Collectively, these data gathering initiatives laid the groundwork for a key milestone in the Foundation’s movement building efforts—the Equal Voice for America’s Family Campaign in 2008.

**The Equal Voice for America’s Family Campaign, 2008.** In 2007, the Foundation assembled a group of grantees referred to as “the movement building study group” to consider the question: What would it take to spark and sustain a movement that elevates the voices of poor families across the many issues that impact their lives? The study group’s response was to directly ask poor families. This led to 65 town hall meetings where 15,000 participants discussed their greatest concerns, and identified eight interrelated issues integral to a comprehensive approach to address the challenges families face. These issues-child care, criminal justice reform, education, employment and job training, health care, housing, immigration reform, and safe and thriving communities-were used to develop the Equal Voice National Family platform. The platform included recommendations for local, state, and federal policy changes related to these issues. In September 2008, the Foundation gathered another 15,000 families in three locations (Birmingham, AL; Chicago, IL; and Los Angeles, CA), connected through technology, to ratify

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23 See *Paving a Road of Hope*, 2014, p.8.
the platform. In 2009, a delegation of 150 families travelled to Washington DC to present the platform to elected officials.\textsuperscript{25}

**Strengthening movement building: Post-2008 Campaign activities.** Since 2008, the Marguerite Casey Foundation has delineated nine actions central to supporting movement building. Serving as a roadmap for other philanthropic foundations, these nine actions are:

- *Engage families.* Families have the capacity and understanding of their issues to find solutions to their problems.
- *Help grantees ground action in research.* Research lends credibility to the work of groups directly engaged in movement building by amplifying the authentic needs and realities of families – rather than relying on guesswork or anecdote.
- *Invest for the long term.* Meaningful social change takes time. The Foundation provides mainly multiyear grants for general operating support, which allows organizations to build capacity in real time, without having to worry about factors outside their control.
- *Reinvent communications* to highlight issues affecting low-income people in a money-oriented culture.
- *Foster collective leadership* so that those in whose name a campaign or movement is waged can lead and speak for themselves, without intermediaries.
- *Re-envision the role of the program officer* as a partner and collaborator with the grantees.
- *Leverage outside resources* because the changes envisioned by families will require much more than the resources of the philanthropic sector in its entirety.

- **Convene stakeholders.** Because of its resources and grantmaking power, the Foundation is uniquely positioned to bring together a burgeoning movement without necessarily making decisions about its course.

- **Build the road by walking** because the most important work of movement building is done collectively and, sometimes, spontaneously.  

  “Building the road” has included several activities that have advanced the Foundation’s movement building efforts. For example, the Foundation has expanded its two initial sub-regional Equal Voice networks (Rio Grande Valley and Mississippi Delta) to 14 (13 in nine states and one national network). These networks promote inter-grantee communication and collective action across platform issues. Grantee networks are able to come together with the support of network weavers. Initially, network weavers were hired by the Foundation to build networks of grantees on the ground. However, the Foundation learned that the networks would be better served if network weavers were hired by, and reported to, the networks themselves, and it made this change in 2009. Network weavers facilitate network activities that advance policies to improve the lives and communities of poor families at the local, state, and national levels; keep records to capture network accomplishments and inform future actions; promote intra-network communication to keep grantee groups informed about key events and legislative issues; serve as public relations representatives; coordinate press and public outreach, including preparing press releases and building social media momentum and people power; and strengthen connections with the Marguerite Casey Foundation. The network weaver’s position is another innovation that the Foundation has brought to the field of philanthropy.  

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In 2009, the Foundation created *Equal Voice News*, an award winning on-line news source for in depth coverage of the work of grantees as well as policies that affect poor families. Equal Voice News has a monthly readership of over 19,700 individuals, and provides news and opinions from perspectives largely absent in mainstream media – that of poor families and grassroots organizations. The communications team uses social media, targeted campaigns, grantee profiles, the Foundation’s monthly newsletter, news stories, and the Equal Voice quarterly magazine to influence coverage of issues of importance to low-income families within a national context, and build an online community to support and advance the Foundation’s mission. In addition, the communications team has helped to advance the Foundation’s efforts to build a critical mass of youth leaders. Specifically, it partnered with grantees to create a youth engagement project and developed the *Maria Full of Hope* documentary and companion youth empowerment toolkit.

The Foundation has also created several awards to advance its mission: the Equal Voice Journalism/Fellowship Award, the Patiño Moore Legacy Award, and the Sargent Shriver Youth Warriors Against Poverty Award. The Equal Voice Journalism/Fellowship Award aims to increase the public’s and policymakers’ understanding of poverty through journalism, offering fellowships for professional journalists and scholarships for students of journalism. In partnership with the Association of Black Foundation Executives (ABFE) and Hispanics in Philanthropy (HIP), the Patiño Moore Legacy Award recognizes organizations whose work

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28 In 2016, Equal Voice News received a second-place award from the Society for Features Journalism (SFJ), in the video storytelling category (Division 3) for its story “The Dignity of Living: America’s Home Care Aides.”
29 Personal communication, Kathleen Baca, July 2016.
fosters collaboration between Latino and African-American communities to effect positive, sustainable change for all of America’s families. The award is named after Dr. Douglas Patiño and Wenda Weekes Moore, leaders in the fields of higher education and public service, for their ongoing legacy of working together to improve relations between Black and Brown communities. In 2012, the Sargent Shriver Youth Award, named after the architect of the War on Poverty and visionary leader of Head Start, Peace Corps, Job Corps and VISTA, was initiated. This award recognizes youth leaders dedicated to improving the lives of families and their communities.32

The Foundation has also continued to hold local, regional, and national convenings to facilitate stakeholder interaction and collaboration. In 2012, for example, the Foundation held an online convention which brought together 15,000 families connected via phones, social media, and in person to collectively revise and expand the Equal Voice National Family platform (see Table 1 for a description of the issues included in the 2012 platform).

Table 1. 2012 Equal Voice National Family Platform Issues

| Child Care | Increase access to quality, affordable child care for families of all economic backgrounds. Invest more money in child care subsidies and early childhood education. Prepare young children to succeed in school. |
| Criminal Justice Reform | Address the criminal justice system’s disparate impact on communities of color. Reinstate voting rights and eligibility for safety-net programs for ex-offenders upon their parole. Help ex-offenders to rebuild and keep their families together. |
| Education | Support all students to succeed. Involve parents in school decisions and in their children’s education. Eliminate zero tolerance policies that push students out of school. Provide access to college preparation classes. Make college more affordable. |
| Elder Care | Provide adequate, affordable housing and care for all seniors to live with dignity. Protect economic security. Support grandparents raising grandchildren. |

32 To learn more about these awards, see http://caseygrants.org/about-us/awards/
Employment/Job Training
Pass living wage laws. Enforce labor laws for all workers, including domestic workers. Stop wage theft. Provide paid sick days for workers. Promote local hiring and workforce development.

Environmental Issues
Ensure that all families have access to clean air and safe water. Guarantee that low-income communities are fairly represented in land use, regulation and community development planning and implementation.

Food Security/Access to Healthy Food
Ensure that all families have access to affordable, healthy food.

Health Care
Provide access to affordable health and dental care, including mental health services, for all. Ensure that the needs of people with disabilities are met. Improve public programs, such as Medicaid, by making them simpler to apply to and easier to access.

Housing
Build affordable housing. Eliminate predatory lending practices. Prevent families from being displaced by development and gentrification. Protect the rights of tenants.

Immigration Reform
Support immigration reform that keeps families intact. Provide more pathways to citizenship. Separate the responsibilities of Immigration and Customs Enforcement (ICE) and the police.

LGBT Rights
Recognize and support the legitimacy of all families.

Transportation
Guarantee access to safe, reliable, and affordable public transportation that serves all families where they live, work and go to school. Invest in transportation infrastructure.

Youth Engagement
Strengthen leadership and organizing skills of youth so they can take an active role in their communities. Prepare youth to succeed in college and the workplace. Support summer jobs programs for youth.

Source: Marguerite Casey Foundation at: http://caseygrants.org/equalvoice/national-family-platform/

Finally, the Foundation has identified five indicators of successful movement building within the Equal Voice framework—policy impact, family engagement, network development, organizational capacity building, and leadership development—that serve as important measures of progress. Policy impact refers to policy reforms (passing or blocking a policy as well as preventing cuts or other changes) at all levels (local, regional, and national) that improve the economic and social well-being of families. Family engagement refers to the extent to which families define issue priorities and are actively involved in policy and campaign work. Network development refers to how well grantee organizations sustain ongoing relationships with families and other groups to build power and coordinate efforts to bring about change. Organizational
capacity refers to the degree to which organizations have the skills, knowledge, and resources to achieve their missions, including staffing, financial resources, technology, and leadership. Lastly, leadership development refers to how well families are provided with education and training to empower them to speak out and take action, be recognized as spokespeople in their communities, and educate others.

Thus, with 15 years of progress behind it, 2016 is an opportune time for the Foundation to reflect on its successes and contemplate next steps toward realizing its mission. This report has been designed and written to facilitate this process.
Evaluation Methods

Design

The primary goal of this summative evaluation is to provide a holistic understanding of the current impact of the Marguerite Casey Foundation as a change agency seeking to empower poor families. Taking into account the historical and socio-cultural context in which the Foundation is embedded, this evaluation provides an analysis of its current activities and impact, through the voices of key stakeholders, as well as areas for continued improvement. For this purpose, it takes a multi-source, multi-methods approach to integrate the perspectives of key organizational stakeholders, including Foundation leaders, personnel, and grant recipients.33

Data Collection

After an extensive review of the Foundation’s literature including newsletters, reports, and web-based materials, primary data collection began in October 2015 and occurred over six months. Data collection activities included:

- Semi-structured individual interviews with the Foundation’s President and CEO and Board of Directors (see Appendix 1 for semi-structured interview protocol).
- Focus group and individual interviews with the Foundation’s leadership team and staff (see Appendix 2 for individual and focus group interview protocols).
- Development and administration of a qualitative survey for network weavers (see Appendix 3 for network weaver survey), and
- Development and administration of a quantitative grantee survey with open-ended questions (see Appendix 4 for a description of the survey methodology).

33 The authors would like to sincerely thank participants of the study for openly sharing their thoughts and insights.
Data Analysis

These varied data collection activities resulted in qualitative and quantitative data from Foundation leaders (11) and staff (20); network weavers (12), and current and former grantees (211), that were analyzed as described below.

**Qualitative data analysis.** The audio-taped interviews (31) and qualitative surveys (12) were transcribed into Word files and imported into Ethnograph 6.0, a qualitative data analysis software program, for coding. Coding proceeded using first deductive and then inductive strategies. Some codes were created prior to the categorizing stage of data analysis based on evaluation objectives. Other codes emerged from the process of reading and re-reading the transcribed interviews as well as the extant literature on poverty, philanthropy, and social movements. A total of 50 primary and secondary codes were generated. After initial coding, the authors met to discuss their impressions, and reduce the codes to key themes related to the Foundation’s current activities and future growth and development.

**Quantitative data analysis.** Over two hundred current and former grantees responded to a confidential online survey to gather information about their perceptions of the Foundation. A database was created using Stata 14 and analyzed in five stages. First, seven perception scales were created. Then, exploratory descriptive statistics of overall scale scores and items were conducted. In the third stage, data were analyzed to identify different patterns of results between current and former grantees. In the fourth stage, current grantee data were examined across key dimensions: geographical scope-South, Southwest, West, Midwest, and National; organization size-as defined by number of paid, full-time employees; years of operation; and years of funding. Finally, open-ended responses were coded and integrated into the quantitative analysis to
supplement survey results and expand understanding of grantees’ perceptions. The findings resulting from these analyses are described in the following section.
Findings

Part I. Defining the Foundation: Emergent Themes from Leaders, Staff, and Network Weavers

Drawing on qualitative interview and survey responses from Marguerite Casey Foundation leaders and staff, and network weavers, this section describes three themes that emerged most frequently across stakeholders in their descriptions of the Foundation and its overall performance: 1) organizational climate-defined here as the conditions within the Foundation as experienced by key stakeholders, 2) perceptions and support of grantees, and 3) accomplishments and areas of impact.34

Organizational climate. Participants identified four characteristics that defined the Foundation’s climate: mission, diversity, support, and collaboration.

Mission. The Marguerite Casey Foundation was widely described as an ethical and mission driven organization. This sentiment was expressed across participants regardless of their roles, professional experiences, and years with the Foundation. Participants valued the Foundation’s mission and closely identified with it. For staff whose professional experience was outside of philanthropy, employment at the Foundation gave them a sense of being connected to a greater purpose, “part of an organization that contributes to helping families.” Several participants also commented on the “complexity,” “boldness,” and “breadth” of the mission, describing it as “motivating” and “gratifying.”

34 As described in the Methods section, the themes presented here were derived from interview data collected from Foundation leaders and staff as well as open-ended survey data from network weavers. The themes are presented to reflect participants’ perceptions and responses in a holistic rather than quantifiable manner. Direct quotes are used to provide evidence of and to illustrate the themes reported. Identifying information is not included in these findings to ensure participants’ anonymity and confidentiality. A similar approach was taken when describing grantees’ perceptions in Part II of the Findings.
**Diversity.** Staff, Board members, and network weavers also favorably viewed the Foundation’s commitment to and enactment of diversity, which they noted was visible throughout “every level” of the organization. For example, when delineating features of the Foundation that he found particularly appealing, one Board member stated, “The deliberate and open perspective and priority around diversity, not only in program work and how the grants are made, but in the leadership and personnel of the organization itself. I love that.” While this commitment has presented staffing challenges given the organization’s location in a state with limited racial and ethnic diversity,\(^3\) the Foundation’s persistence and success in this area are seen as distinguishing features.

**Support.** Staff members also reported that they felt supported by the Foundation, observing that, “[It] takes really good care of its people.” Staff especially valued the opportunities for professional growth, and fair and competitive compensation. Several staff members reported that they have made lateral and vertical transitions in the Foundation as their interests and skills have developed over time. Staff also stated that the Foundation’s leadership is open to new ideas and innovations. In addition, newer staff members reported having many opportunities to apply and extend the professional skills they have developed in their fields of expertise to their current work. Finally, staff members noted that the Foundation rewarded their hard work with a generous compensation package including “retirement benefits probably unheard of among many companies in 2015.”

**Collaboration.** Participants also described the Foundation’s climate as caring and collaborative. Team work was a commonly identified feature of the work environment. Staff reported that each member responsibly carries out his or her role in order to support colleagues

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\(^3\) For population demographics for Washington state, see: http://www.census.gov/quickfacts/table/PST045215/53
and the Foundation’s larger mission. One staff member further observed that when conflicts arise, staff “don't get stuck in the problem, they get stuck in the solution.” Open communication and clear roles, responsibilities, and expectations contributed to participants’ perceptions of the Foundation as “an environment that nurtures … collaboration.” Network weavers, while not employees of the Foundation, agreed with this assessment. They described not only the support provided by staff members but also the Foundation’s role in creating collaborative “spaces for weavers to come together to share best practices, successes and challenges.” Thus, participants identified mission, diversity, support, and collaboration as key elements of the Foundation’s climate influencing their professional activities, engagement, and satisfaction.

**Perceptions and support of grantees.** Participants also identified the Foundation-grantee relationship as central to the Foundation’s identity and work.

**Perceptions of grantees.** At the core of the Foundation’s work is the selection and support of grantees, and the strengthening of grantees’ work through regional networks. The selection of grantees involves identifying “cornerstone” organizations that embody the Foundation’s mission, vision, and Equal Voice strategy, and are committed to working with other grantee organizations in their geographic regions to advance movement building.

Qualitative interview and survey data indicate that participants value and are inspired by the Foundation’s grantees. In particular, staff members described grantees as “partners” and building trusting relationships with them as “key to advancing an agenda to eradicate poverty for families.” They also identified facilitating and “highlighting” grantees’ efforts as the central purpose of their work at the Foundation.

**Perceptions of support for grantees.** Participants especially valued three key areas of grantee support-long-term general funding, the “ask, listen, act” brand promise, and network
support. Each was seen as positively impacting movement building and distinguishing the Foundation as unique in the field of philanthropy.

**Funding.** One network weaver described the Foundation’s “financial support, particularly in the way that it has been administered” as “ingenious.” Board members viewed it as a sign of trust; one stated, “The Marguerite Casey Foundation is willing to give support to an organization without strings attached; that gives power to that organization. The [organization] is being trusted.” Staff members concurred, one opined, “We trust our organizations and our grantee partners, and the idea … has been groundbreaking.” Another agreed, adding, “So many donors are in and out…. You can't win long-term campaigns unless you're dedicated…. The Foundation funds systemic change.”

While participants favorably viewed grantees and the Foundation’s support of their work, some respondents noted that not all grantee organizations have been able to meet the Foundation’s requirements for sustained funding. Reflecting the Foundation’s commitment to grantees and the quality of relationships that develop over time, a staff member described the difficulty of severing ties with these organizations:

There are criteria that we would like them to meet to be an organization in our portfolio. If they can no longer sustain movement building, or can't financially sustain themselves, then we have to leave the partnership. …It's hard for all of us, and it's a hard conversation to have.

“*Ask, listen, act.*” The Foundation’s brand promise that emphasizes asking questions and listening to the responses of grantees and families before “acting” was also viewed positively. One Board member summarized the uniqueness of this promise:
It is how the Marguerite Casey Foundation listens to [grantees and families]; how it brings them to the thinking process and to decision making. It is about linking families and linking communities. It is about building a movement. This is what is unique.

A staff member described grantees’ positive response to the Foundation’s brand promise. He shared:

The ‘ask, listen, and act’ [promise], you see that all over [our work]. We go into places and you can tell that they anticipate that we're going to talk with them and listen to them about the work that they do. We're not coming in to tell them what to do…. We sit down and gather their input….

**Accomplishments and areas of impact.** Finally, participants identified several significant accomplishments that have moved the Foundation closer to its goal of establishing a transformative movement that centers on the voices of poor families. These were characterized as: 1) policy impact, 2) network development, 3) leadership development, 4) strategic communications, 5) incubation of a membership organization, and 6) influence in the field of philanthropy.

**Policy impact.** Participants identified grantee and network impact on policies central to the Equal Voice platform as key accomplishments. For example, Board members, Foundation staff, and network weavers noted the mobilization by grantees and networks of hundreds of thousands of voters to help pass Proposition 30\(^{36}\) and Proposition 47\(^{37}\) as major

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\(^{36}\) With the passage of Proposition 30 in November 2012, Californians temporarily raised tax rates to help prevent more than $5 billion in education cuts and restore the fiscal health of schools.

\(^{37}\) Proposition 47, the ballot initiative passed by California voters on November 4, 2014, reduces certain drug possession felonies to misdemeanors.
accomplishments. However, participants did not only cite major wins such as those in California as successes but also smaller policy wins, especially in the South and Southwest, where grassroots organizing and community mobilization are not as well developed or funded. One staff member observed, “There are a lot of small but notable wins throughout a year that we collect and ask about.” While participants noted the importance of these policy wins, they also recognized their tenuousness and the need for ongoing struggle on the part of grantee organizations and networks to create lasting change for poor families. Using Kentucky as an example, one staff member summarized:

They won voter rights back for people who served felony convictions and were completely disenfranchised. But then the new governor rescinded what they won by executive action. It was a 10-year win that was lost. [Grantees] are now trying to gain traction for a statewide constitutional amendment.…

**Network development.** Participants also viewed the Foundation’s support for regional networks and network weavers as noteworthy accomplishments. A staff member shared, “I think one of the biggest accomplishments of the Foundation has been the creation of the Equal Voice networks. It has brought regional organizations together under one goal, and that's to move low-income families out of poverty.” Participants also described the network weaver’s role as a significant innovation. For example, a Board member explained:

Network weavers bring together different people who perhaps, if left to their own devices, would not collaborate or come together. The weavers bring Brown, Black, Asian, everyone across different sectors, together…. and, people see that there is much more strength in the whole than in the different parts.
Leadership development. A third commonly identified indicator of progress was leadership development. Specifically, participants noted the Foundation’s impact on the development of grassroots leaders. One Board member observed:

The idea about giving [families] voice is real. In the years that I have been on the Board, I have seen people who were shy about speaking up. Then over time you see that these are the people who become the spokespersons for [their communities].

Participants also commented on the Foundation’s role in building a pipeline for grassroots leaders to move into elected positions on city councils and in state legislatures. This leadership pipeline provided individuals with policy, voter mobilization, and fundraising experience through membership in grantee organizations.

Some participants were especially proud of the Foundation’s youth leadership initiatives, which they saw as critical to movement building. One Board member explained that the Foundation seeks to “identify potential leaders for the future. The Sargent Shriver awards are an attempt to find and promote young people who will carry this on in a way that hasn’t been done in the past.” Another Board member expressed a similar sentiment, stating:

I love the entire work of the Foundation, but I believe that the work with youth is particularly important…. [T]hese young people are leaders as youth; imagine what they will achieve when they get older. Some of them will be running for [public] office; you can see it in their commitment and passion.

Strategic communications. Participants also identified the Foundation’s communications strategy as a key accomplishment. As illustration, a staff member stated, “One accomplishment that I've seen at the Marguerite Casey Foundation …is Equal Voice News, which always tries to
elevate the voices of families, especially working and low-income families and individuals.”
Another added, “It's incredible to see a foundation trying to actually present a more accurate
view of poverty.” Still another stated, “It's nice that instead of that top down approach to news
writing, it’s a bottom up approach. It's empowerment; it's trust.” Summarizing the newspaper’s
transformative mission, another staff member explained:

At the heart of what communications tries to do is to show everyday people on the
frontlines that they have something to teach, things that people need to know, and
that they can speak quite well for themselves and … [influence] policy.

Also noted as an accomplishment is the overlapping roles of communications and
grantmaking in the Foundation’s movement building efforts. One Board member observed,
“Another milestone is the way the [Foundation] is now making communications as important as
giving grants…the newspaper and the way social media are used are pretty cutting edge.” The
President and CEO echoed this sentiment, stating:

In this Foundation, we have communications and grantmaking at the same scale,
same level. Communications is very important for us because we are using that to
change the debate in America; to make sure people are paying attention to poor
communities. We have an on-line newspaper that has become the source of
information on the issue of poverty in America. That to me is very important.

**Incubation of membership organization.** Participants also identified the incubation of an
independent 501(c)(4) not-for-profit, national membership organization, now known as Equal
Voice Action, as a key Foundation accomplishment. The national organization is viewed as a
strategy to complement the Foundation’s existing work to elevate the voices and expand the
power of families and communities in poverty. Describing its importance to the Foundation’s mission, a Board member observed:

I think the biggest challenge is to get the message across that [the nation] can’t continue living with poverty. I see the membership organization as one way to do this because it’s not an outside group telling poor people what they should do. It is people who are poor or interested in eliminating poverty banding together to figure out how to do it, with the power of numbers.

Board members and staff optimistically viewed Equal Voice Action’s launch in September of 2014. When discussing the future of the membership organization, a staff member shared, “In five years I'd like to see it be a thriving organization that actually impacts policy on a national basis.”

Influence on the field of philanthropy. Another area of impact that was commonly cited was the Foundation’s influence on the field of philanthropy. Participants consistently described the Foundation and its philanthropic strategy as innovative and leading edge. As one staff member shared, “We set out from the beginning to do things differently.” Participants were especially committed to showing the merits of the Foundation’s funding approach; prioritization of poor families’ voices; and emphasis on issue education, advocacy, and activism through networks and movement building. A staff member explained, “We are in social justice philanthropy and … we have a role to play in being visible and making sure that we're showing the [Equal Voice] strategy works.”

Recent changes in the funding priorities and strategies of major foundations were cited as evidence of the Foundation’s growing influence, which participants hoped to extend over

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38 For a discussion of some of these changes and their commonalities with the Marguerite Casey Foundation’s approach, see Ruth McCambridge’s, *The Ford Foundation’s New Direction* at
time. According to one staff member, “I feel that it is a big accomplishment to have other foundations talking about what we're doing. Some of them are even changing what they're doing. Whether it’s because of us or not, they're doing it.” Providing an example of changes in the field of philanthropy, another staff member observed, “When the Foundation started, less than 10% of foundations were giving general operating [grants] …now that number is at 25%. It seems to actually be coming around.”

Taken together, these accomplishments were described as proving that movement building as a philanthropic strategy “made a lot of sense and ... not just could happen, but is happening.” While acknowledging that the Foundation’s mission is not complete; participants nonetheless were enthusiastic and optimistic about its “progress on one of the most difficult questions of the day.”

**Part II. Defining the Foundation: Description and Perceptions of Current and Former Grantees**

To provide a comprehensive and reliable description of the Foundation’s grantees, this portion of the Findings section first draws on two sources of data: current grantee profiles included on the Foundation’s webpage and the grantee survey. It describes current grantees in terms of their geographical scope, main Equal Voice National Family platform issues, organization size and years in operation, and funding received (years and amount). Then,
drawing solely from the survey, this section reports key findings on grantees’ perceptions. These findings include grantees’ general impressions of the Foundation’s mission and goals; perceptions of the Foundation’s Equal Voice strategy, support for and understanding of their work, and guidelines and procedures; as well as relations with Foundation personnel. This section concludes with a focus on former grantees, providing a brief description of their main features and perceptions.

**Overview of current grantees.** Since its inception, the Foundation has provided financial support to approximately 450 organizations whose primary mission has been to empower poor families in a national fight against poverty. The Foundation currently funds about 187 grantees (Regional and National) implementing projects around the country. Regional grantees are organized in portfolios based on their geographical scope (South, Southwest, West, and Midwest). The National portfolio includes philanthropic infrastructure organizations, policy-research institutes, national organizing networks and advocacy organizations, as well as technical assistance providers. Thus, the National portfolio uniquely responds to the Foundation’s goal to “connect, equip, and resource movements and campaigns across place to advance opportunities for working families” (p. 1). Because National grantees are qualitatively different in their scope and relations with the Marguerite Casey Foundation, they will likely differ from regional grantees in their characteristics and perceptions of the Foundation. The following results should be interpreted with this awareness.

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41 Many of the findings reported here mirror findings in the Foundation’s 2014 report. See, Harder+Company Community Research, 2014.
42 Littles, 2012.
Description of current grantees. Overall, the Foundation has a diverse group of current grantees in terms of their geographical scope, main platform issues, organizational size, and years of funding received.

Geographical scope. Based on the Foundation’s grantee profiles, a slightly larger concentration of current grantees are found in the South (26% of grantees), which is also the region of the country with the highest concentration of poverty.\(^43\) Across the Southwest, West, and National regions, the distribution of grantees is even (around 20%). The smallest number of grantees is found in the Midwest region (11%). A similar pattern of geographical scope was observed when examining grantee survey responses. The largest concentration of current grantees who responded to the survey is in the South and the smallest in the Midwest (29% and 11%, or 40 and 15 participants, respectively). From the remaining participants, 18.7% and 15.8%, respectively (26 and 22 participants) were located in the Southwest and West. Also, 22.3% (or 31 participants) were National grantees, and 3.6% (5) chose “Other” as their geographical scope.\(^44\)

Equal Voice platform issues. The Foundation’s grantees address a broad range of issues included in the Equal Voice National Family platform (see Table 1).\(^45\) When asked in the survey to select a maximum of three of the 2012 platform issues that best described their work, about 40% of current grantees reported three main issues and 50% reported one or two. An additional 8% reported that they were not working on any of the platform issues listed. The most frequently

\(^43\) See, Bishaw, 2014.
\(^44\) Sample sizes for the West and Midwest regions were too small (less than 25 cases per group) to have sufficient power to detect small or moderate statistically significant effects. While there is no agreement in the social science research community regarding the minimal sample size when conducting group comparisons, 30 cases per group is the least conservative number.
\(^45\) The Foundation does not choose organizations to fund by issue, and expects that grantees will work with partners across issues.
reported platform issues were education, immigration, and youth engagement. The least reported platform issues included LGBT rights, elder care, child care, and transportation (see Figure 2).

Figure 2. Most Frequent Equal Voice Platform Issues Identified by Current Grantee Survey Respondents (percentages, 139 survey participants)

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>LGBT rights</td>
<td>1.4</td>
</tr>
<tr>
<td>Elder care</td>
<td>3.6</td>
</tr>
<tr>
<td>Transportation</td>
<td>5.0</td>
</tr>
<tr>
<td>Child care</td>
<td>6.5</td>
</tr>
<tr>
<td>Food security/Access to healthy food</td>
<td>10.1</td>
</tr>
<tr>
<td>Health care</td>
<td>10.1</td>
</tr>
<tr>
<td>Housing</td>
<td>15.8</td>
</tr>
<tr>
<td>Environmental issues</td>
<td>16.6</td>
</tr>
<tr>
<td>Employment/job training</td>
<td>18.7</td>
</tr>
<tr>
<td>Criminal justice reform</td>
<td>20.9</td>
</tr>
<tr>
<td>Youth engagement</td>
<td>31.7</td>
</tr>
<tr>
<td>Immigration reform</td>
<td>34.5</td>
</tr>
<tr>
<td>Education</td>
<td>40.3</td>
</tr>
<tr>
<td>Other</td>
<td>41.0</td>
</tr>
</tbody>
</table>

Note: Based on survey responses; 0% missing cases.

As Figure 2 indicates, a significant proportion of grantees (about 40%) reported primarily focusing on “other” issues. Table 2 presents grantees’ responses for the “other” category, which included a combination of issues and movement building strategies. Commonly reported issues were economic development (31.6%, including “worker rights” and “wages and labor”), and government and political reform (21.1%, including voting rights and political accountability). Commonly reported movement building strategies included community organizing and

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46 While several of these responses mirrored platform issues, grantees nevertheless selected “other” and used their own words to describe their work.
leadership development (19.3%).

Table 2. Main Themes Emerging from “Other” Responses (n=57; percentages)

<table>
<thead>
<tr>
<th>“Other” Issues</th>
<th>Occurrences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic development (including worker rights, economic justice, and anti-poverty measures)</td>
<td>31.58</td>
</tr>
<tr>
<td>Government and political reform (including voting rights and political accountability)</td>
<td>21.05</td>
</tr>
<tr>
<td>Civic engagement/community development (including community organizing and leadership development)</td>
<td>19.30</td>
</tr>
<tr>
<td>Movement and capacity building (including networking and technology capacity building)</td>
<td>14.04</td>
</tr>
<tr>
<td>Racial justice (including anti-racism and Native-Americans)</td>
<td>12.28</td>
</tr>
<tr>
<td>Criminal justice reform, women’s rights, multi-issue, philanthropy, youth and families, violence prevention, gentrification, homelessness, predatory lending, media justice</td>
<td>Less than 10</td>
</tr>
</tbody>
</table>

Note: Percentages may exceed 100% due to rounding; some participants reported more than one “other” issue.

For the most frequently selected platform issues, response patterns were consistent across geographical scope. The proportion of grantees involved in immigration reform, health care, employment, child care, criminal justice reform, LGBT rights, and transportation were similar across regions. No statistically significant differences were observed when conducting sub-group analyses. In contrast, differences were observed in education, housing, food security/access to healthy food, environmental justice, and youth engagement. For example, about two-thirds of grantees in the Midwest identified “education” as one of their three primary issues, but this percentage decreased to about 50% for grantees in the South and Southwest, 40% for grantees in the West, and 17% for National grantees. Also, about 39% of grantees in the

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47 As previously noted, all grantees work across-issues as delineated in the Equal Voice strategy. This response represents respondent(s) who explicitly reported taking a “multi-issue” approach to the work they do.

48 Grantees were asked to identify their top three focal issues. Thus, it is important to note that survey respondents may be working on additional issues not captured in the survey.
Southwest identified “environmental justice” as one of their three primary issues, but only 18% and 13% of those in the South and West, respectively, did so.

**Grantee size and funding.** MCF’s current grantees are also diverse regarding their size (as defined by number of paid full-time staff) and the number of years in operation. Nevertheless, the majority of grantees are small to medium organizations (median=10 paid full-time staff; mean= 20.14; SD=32.36). Survey responses indicated that about 30% of current grantees have 5 or fewer full-time employees. Slightly over one-fourth are larger with 21 or more full-time employees (see Figure 3).

Figure 3: Number of Paid Full-time Staff of Current Grantees (percentages, 139 survey participants)

![Chart showing distribution of paid full-time staff](chart.png)

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 4.3% missing cases (6 cases).

When examining differences in organization size by geographical scope, statistically significant differences were observed between National grantees and those from the South, West, and Southwest. On average, National grantees had more paid full-time staff than grantees working in the other three regions. Specifically, National grantees, on average, had 15 more paid...
full-time staff than those in the South. This number increased to around 16 and 20 for the Southwest and West regions, respectively.

Current grantees reported extensive experience (mean=27.9; SD=21.09). The majority (76%) of current grantee survey respondents were well-established organizations, functioning for over 16 years (see Figure 4). Only five percent have been operating five years or less. When examining whether there were differences by region, no statistically significant differences were found.

Figure 4: Current Grantees’ Number of Years in Operation (percentages, 139 survey participants)

![Bar chart showing years of operation](image)

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 4.3% missing cases (6 cases).

Funding received. On average, current grantees who participated in the survey received 7.5 (SD=4) years of funding. Consistent with the Foundation’s approach to funding, about 38% of survey respondents have received funding for more than 10 years (see Figure 5). When

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49 Also, note that current grantees’ size and years of experience are moderately correlated (r=0.34), which implies that larger grantees tend to have more years of experience or vice versa.
examining regional differences in total years of funding received, no statistically significant differences were observed.

Figure 5: Total Years of Funding Received by Current Grantees (percentages, 139 survey participants)

![Bar chart showing the distribution of total years of funding received by current grantees.]

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 5.0% missing cases (7 cases).

Based on their web profiles, the funding amount received by current grantees varies significantly.\(^5^0\) As Figure 6 indicates, the largest group of grantees (36%) received between $250,001 and $350,000 to support their activities. Also, 18% of grantees received $150,000 or less and 22% received between $150,001 and $250,000.

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\(^{50}\) The Foundation’s yearly-target grant size is 25% or less of organizations’ annual revenues.
Perceptions of current grantees. To better understand the perceptions of current grantees, the survey asked about seven key areas of interest: 1) general impressions of the Marguerite Casey Foundation, 2) perceptions of the Equal Voice strategy, 3) perceptions of shared goals and alignment, 4) perceptions of support for organizational functioning, 5) perceptions of Foundation understanding of grantees, 6) perceptions of grantee understanding of Foundation guidelines and procedures, and 7) perceptions of relationships with Foundation personnel. These components have been identified in the literature as relevant for building productive and sustainable partnerships between funding agencies and grantees. Quantitative results were first examined for the overall group of current grantees and then compared across grantees’ geographical scope, organization size, years of operation, and years of funding. When

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51 See Foster & Ditkoff. “When you’ve made enough to make a difference,” 2011.
examining the comparative findings, it is very important to consider the contextual information provided in previous sections. It is also important to consider the size of the samples being compared, which affects the statistical power available for analyses. For example, when reading about differences between Regional and National grantees, it is important to consider that these grantees are qualitatively different and therefore differences in perceptions are expected. Also, we are not able to describe specific findings for the Midwest (15 participants) or West (22 participants) due to small sample sizes for both regions.

**General impressions of the Foundation.** Current grantees’ general impressions of the Foundation were overwhelmingly positive (mean score=5.58 out of 6). Current grantee survey respondents showed high levels of agreement with statements included in the “general impressions of the Marguerite Casey Foundation” scale (mean scores between 5.37 and 5.66). Of note, more than two-thirds of current grantees strongly agreed with items concerning the Foundation’s trustworthiness, contributions to the well-being of poor families and children, and expertise about poor families (see Figure 7).
General impressions of the Foundation were not statistically different by grantee size or years of operations. However, there were statistically significant differences in grantees’ perceptions by organization’s years of funding and geographical scope. When examining results by geographical scope, statistically significant differences emerged in items concerning the Foundation’s contributions to the lives of poor families; its expertise about poor families; and its trustworthiness (three out of the four items). Specifically, compared to Southwest grantees, National grantees reported lower scores on all three items. National grantees also reported lower scores than grantees in the South on the two items concerning the Foundation’s contributions to the lives of poor families and its expertise about poor families. For example, 80.7% of Southwest

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52 All negative responses were collapsed to slightly disagree or less due to their low incidence.
grantees strongly agreed that the Foundation is making a difference in the lives of poor families; but only 55.6% and 70.0% of National and South grantees, respectively, reported a similar level of agreement.

When examining results by years of funding received, statistically significant associations emerged for items concerning the unique nature of the Foundation’s funding and its contributions to the lives of poor families (two out of the four items). As years of funding increased so did the scores for the two items. For example, about 57.6% of grantees who received 6 or fewer years of funding strongly agreed that the Foundation is making a difference in the lives of poor people; whereas this percentage increased to 81.8% and 81.6% for those grantees who had received between 9 and 12 years of funding, and more than 12 years of funding, respectively.

Current grantees’ positive perceptions about the Foundation were clear in their qualitative responses as well. They used adjectives such as “critical,” “precious,” “instrumental,” “progressive,” and “invaluable” when describing the Foundation. Other participants considered themselves “very privileged” to work with the Foundation or shared how much they loved being grantees. Overall, grantees were very grateful for the support received over the years, the Foundation’s unique approach to movement building, and the Foundation’s focus on issues of equity and social justice. As explained by one participant:

At a time when more people are talking about the organizing methods that are our bread and butter but fewer seem to be investing in it, we feel that Marguerite Casey's approach to movement building and leadership development is precious.

Another survey participant added:
MCF has been instrumental in the creation of leadership and sustainability of organizations and movement infrastructure. MCF has helped galvanize focus through its regional strategies and has made huge gains in assisting communities in pushing and winning campaigns that change material conditions in the lives of our families. We know all too well that deadly delays equal deadly outcomes and MCF has pursued equity with the "fierce urgency of now."

**Perceptions of the Equal Voice strategy.** To examine perceptions about the Equal Voice strategy, the Foundation’s overall strategy reflecting the belief that families can lead a movement to bring about long-term change to improve their well-being, we measured participants’ knowledge and attitudes toward this strategy. Grantees’ perceptions of the Equal Voice strategy were largely positive, but less so than their general impressions of the Foundation (mean=4.92 out of 6). Current grantees who participated in the survey showed higher levels of agreement with the two items measuring their knowledge about the Equal Voice strategy than with the two others measuring their attitudes (5.15 and 4.91 vs. 4.77 and 4.78). About half of current grantees strongly agreed that they understand the elements of the Equal Voice strategy (See Figure 8). Also, around one-third of grantees reported strong agreement on items concerning their knowledge about the development of the Equal Voice strategy and its relevance for building a national movement. The items concerning the role of the Equal Voice strategy for focusing grantees’ work and making them feel part of a national movement had the highest levels of slight agreement, and about 10% of respondents reported slight disagreement.
Current grantee respondents’ perceptions of the Equal Voice strategy were not statistically different by organization size or years of operation. However, there were statistically significant differences in grantees’ overall perceptions by years of funding and geographical scope. When examining results by geographical scope, statistically significant differences emerged for all four items analyzed. Compared to Southwest and South grantees, National grantees reported lower scores in their knowledge of how the Equal Voice strategy was developed, and its relevance for focusing their work and engaging them in a national movement. For example, 44.0% of Southwest grantees strongly agreed that the Equal Voice strategy helps their organizations become part of a national movement; but only 16.1% and 37.8% of National and South grantees, respectively, reported similar levels of agreement. Southwest grantees also

53 All negative responses were collapsed to slightly disagree or less due to their low incidence.
reported higher scores than National grantees on the item concerning their understanding of key elements of the Equal Voice strategy.

When examining results by years of funding received, statistically significant associations emerged in the items concerning current grantees’ knowledge of the development of the Equal Voice strategy, and perceptions of its relevance for focusing their work and involving them in a national movement (three out of the four items). As years of funding increased, so did current grantees’ scores on items examining their knowledge about the development of the strategy and perceptions of its relevance for focusing their work. For example, 45.8% of current grantees receiving more than 9 years of funding strongly agreed that they know how the Equal Voice strategy was developed; but only 40.9% and 20.3% of those receiving between 6 and 9 years and fewer than 6 years, respectively, reported similar levels of agreement. In addition, the relationship between years of funding received and the relevance of the Equal Voice strategy for making grantees feel part of a national movement is not linear. One-half of grantees who received funding between 6 and 9 years reported that they strongly agreed with this item; but only 24.1% and 35.4% of those receiving 6 years at the most or more than 9 years reported similar levels of agreement.

Mixed perceptions about the Equal Voice strategy were also reflected in current grantees’ open-ended survey responses. A majority of grantees recognized the importance of the Equal Voice strategy for connecting with other grantees and gaining visibility. However, others voiced uncertainty (e.g., “The Equal Voice strategy and structure has been a little confusing sometimes.”) and the need for clarifying information (e.g., “We would like more direction on how to make better use of Equal Voice as a 501(c)4 without jeopardizing c(3) status.”).
**Perceptions of shared goals and alignment.** Current grantee respondents’ perceptions of shared goals and alignment with the Foundation were overwhelmingly positive (mean score=5.53 out of 6), showing high levels of agreement with the statements included in the scale (mean scores between 5.23 and 5.57). About two-thirds (63%) of current grantees strongly agreed that their organizations share the Foundation’s mission and goals. However, lower levels of strong agreement were observed with items concerning their own understanding of the Foundation’s mission and goals (48%), levels of awareness of the Foundation’s activities and initiatives (46%), and whether the Foundation is going in the right direction (44%) (see Figure 9).

Figure 9: Current Grantees’ Perceptions of Shared Goals and Alignment (percentages, 139 survey participants)

![Chart showing percentages of agreement for various statements related to shared goals and alignment](chart.png)

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 6.5% missing cases (9 cases). Percentages for the last category are excluded from figure because of size. Responses range from 1-strongly disagree to 6-strongly agree.\(^{54}\)

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\(^{54}\) All negative responses were collapsed to slightly disagree or less due to their low incidence.
Current grantees’ perceptions of shared goals and alignment were not statistically different by organization size or years of operation. However, there were statistically significant differences in grantees’ perceptions of shared goals and alignment by geographical scope and years of funding. When examining results by geographical scope, statistically significant differences emerged for items measuring participants’ understanding of the Foundation’s mission and goals, and beliefs about its current direction (two out of the four items). Compared to grantees in the Southwest, National grantees reported lower scores on these two items. For example, 57.7% of current grantees in the Southwest strongly agreed with these two items; whereas only 31.3% and 34.4%, respectively, of National grantees did so. Grantees in the South also reported greater understanding of the Foundation’s missions and goals than did National grantees.

When examining results by years of funding received, statistically significant associations emerged for two of the four items included in the scale. As years of funding increased, so did grantees’ awareness of the Foundation’s activities and initiatives. For example, about 31.5% of grantees who received 6 or fewer years of funding strongly agreed that their organizations are aware of the Foundation’s activities and initiatives; whereas this percentage increased to 50.0% and 56.3% for those grantees who had received between 9 and 12 years of funding and those receiving more than 12 years of funding, respectively. However, the relationship between years of funding received and participants’ perceptions of understanding of the Foundation’s mission and goals is not linear. Around two-thirds (63.6%) of grantees who received funding between 6 and 9 years reported that they strongly agreed with this item; but only 30.9% and 56.3% of those receiving 6 years at the most or more than 9 years, respectively, reported similar levels of agreement.
Open-ended survey responses also reflected current grantees’ positive perceptions of shared goals and alignment. When describing the Foundation, for example, one grantee mentioned: “[The Foundation] encourages coalition-building and a multi-issue focus always with those most directly affected at the leadership—a great theory of change that is aligned with our own.” Another grantee shared, “Our organization practices undoing racism in all aspects of our work. These principles are in tandem with the mission and goals of the Foundation.”

**Perceptions of support for organizational functioning.** Current grantee respondents also valued the Foundation’s support for their organizational functioning (mean score=5.53 out of 6), showing very high levels of agreement with statements included in the scale (mean scores between 5.18 and 5.88). About 90% of current grantees strongly agreed that the funding received makes their work possible, and is relevant for expanding or deepening their work. Likewise, nearly two-thirds strongly recognized the relevance of the funding received for helping them meet their objectives (see Figure 10). Items concerning the Foundation’s support for increasing visibility and networking, although still favorably perceived, had the lowest levels of strong agreement (44.5% and 47.8%, respectively).
Perceptions of support for organizational functioning were not statistically different by organization size or years of operation. However, there were statistically significant differences in grantees’ perceptions of support by years of funding and geographical scope. When examining results by geographical scope, statistically significant differences emerged for items concerning the Foundation’s support for grantees’ visibility, networking, meeting their organizational objectives, and expanding and deepening their work (four out of five items). Compared to Southwest and South grantees, National grantees reported lower scores on items measuring Foundation support for bringing visibility to their organizations’ work, network development, and expanding or deepening their work. For example, 69.2% of grantees in the

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55 All negative responses were collapsed to slightly disagree or less due to their low incidence.
Southwest strongly agreed that the Foundation has supported networking with other groups; whereas this percentage decreased to 28.6% and 47.5% for National grantees and those in the South, respectively. Similarly, compared to grantees in the Southwest, National grantees reported lower scores on items measuring perceptions of Foundation support for meeting their organizational objectives. For example, 76.9% of grantees in the Southwest strongly agreed with this item; but only 50.0% of National grantees did.

When examining results by years of funding received, statistically significant associations emerged for all five items. As years of funding received increased so did the perceptions of Foundation support for all elements included in the “perceptions of support for organizational functioning” scale. For example, 21.4% and 22.2% of grantees who received 3 or fewer years of funding strongly agreed that the Foundation has helped their organization gain visibility and network with other groups, respectively; but these percentages increased to 47.1% and 51.0% for those grantees with more than 3 years of funding received.

Open-ended survey responses provided additional insights into current grantees’ positive perceptions of Foundation support. Current grantees overwhelmingly recognized the major economic support provided by the Foundation. In their responses, current grantees highlighted the importance of receiving multi-year general grants. One current grantee explained: “Funds from MCF are critical to our organization's ability to stay agile and respond to community concerns in a way that matters.” Grantees also appreciated that “The Marguerite Casey Foundation has provided [them] with the flexibility to utilize the funding in multiple programs.”

While some participants emphasized the financial support received, other grantees recognized the multifaceted nature of the support provided by the Foundation. For example, some highlighted the importance of being able to use funding to provide training and coaching to
their personnel, and receiving direct technical support from the Foundation. As one grantee responded, “[The Foundation] has been willing to discuss our efforts and provide advice and information to help us further the organization’s mission.” Another explained, “Collaboration with Equal Voice News writers has increased our capacity to produce the messages that we need and get our messages out to key audiences.”

Other Foundation support identified by current grantee respondents centered on issues of network building and visibility. For instance, having spaces, like convening meetings, to share their knowledge and experiences, and increase their scope of influence by connecting with other grantees, leaders, and constituency groups was considered very valuable. Increasing visibility of their work and accomplishments as a way of validating their organizations and contributing to their sustainability also emerged as a key support. According to one grantee:

…We have had excellent coverage in Equal Voice News for our work and it has been a good placement for columns and opinion pieces by our leaders; we have felt that these pieces got good exposure.

Another way in which the Foundation has supported grantees’ work is by elevating issues of social justice and the rights of poor families, and providing clear leadership in this work. When explaining this perhaps less tangible form of support, one grantee stated, “The Foundation's approach to grantmaking has been inclusive in nature. They ensure that the issues their grantees focus on are elevated to a broader universe through Equal Voice News.” Other grantees added, “…making a compelling case for the community we work with” and “advocating that funders should support social justice movements” as ways in which the Foundation has supported their work.
Perceptions of the Foundation’s understanding of grantees. Current grantee respondents positively viewed the Foundation’s understanding of their organizations (mean score=5.33 out of 6), showing high levels of agreement with the statements included in the scale (mean scores between 5.14 and 5.44). Nearly 60% of current grantees strongly agreed that the Foundation understands the issues they address and the concerns of their constituencies (see Figure 11). Also, about one-half of current grantees strongly agreed that the Foundation understands their organizational goals. The lowest level of strong agreement was observed for the item concerning the Foundation’s understanding of the challenges inhered in their organizations’ work (40%).

Figure 11: Current Grantees’ Perceptions of MCF’s Understanding of Grantees (percentages, 139 survey participants)

<table>
<thead>
<tr>
<th>Perception</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Slightly agree</th>
<th>Slightly disagree or less</th>
</tr>
</thead>
<tbody>
<tr>
<td>The MCF understands the challenges inherent in my organization’s work</td>
<td>40.0</td>
<td>41.5</td>
<td>13.9</td>
<td></td>
</tr>
<tr>
<td>The MCF understands my organization’s goals</td>
<td>51.5</td>
<td>41.5</td>
<td>4.6</td>
<td></td>
</tr>
<tr>
<td>The MCF understands the concerns of my organization’s constituencies</td>
<td>55.7</td>
<td>29.8</td>
<td>10.7</td>
<td></td>
</tr>
<tr>
<td>The MCF understands issues my organization addresses</td>
<td>57.7</td>
<td>33.1</td>
<td>6.9</td>
<td></td>
</tr>
</tbody>
</table>

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 5.76% missing cases (8 cases). Percentages for the last category are excluded from figure because of size. Responses range from 1-strongly disagree to 6-strongly agree.56

56 All negative responses were collapsed to slightly disagree or less due to their low incidence.
Current grantees’ perceptions of the Foundation’s understanding of their organizations were not statistically different by organization size or years of operation. However, there were statistically significant differences in grantees’ perceptions by organization’s years of funding and geographical scope. When examining results by geographical scope, statistically significant differences emerged in items concerning the Foundation’s understanding of current grantees’ organizational goals and challenges (two out of four items). Compared to grantees in the South, National grantees reported lower scores on both items. For example, 59.5% and 52.6% of grantees in the South strongly agreed that the Foundation understands their goals and challenges; but only 38.2% and 29.4% of National grantees, respectively, reported a similar level of agreement for these two items.

In addition, when examining results by years of funding received, statistically significant differences emerged on all four items included in the scale. As years of funding increased, so did the scores on all four items. For example, 28.6% of grantees receiving 6 or fewer years of funding strongly agreed that the Foundation understands the challenges in their work; but 36.4% and 52.1% of those receiving between 6 and 9 years and more than 9 years, respectively, reported similar levels of agreement.

Grantees’ responses to the open-ended survey questions further elucidate these largely positive findings. For example, one survey participant stated, “The Marguerite Casey Foundation has supported our work by always being understanding of [our] mission and finding ways to connect us with opportunities to fulfill our mission.” Another grantee added the following when describing the support received by the Foundation:

Marguerite Casey is THE strongest supporter of our work. Early on when no one else understood our model of organizing or our strategy for building power and amplifying
the voices of poor families, Casey embraced our vision before we ever got a bill passed or had an organizing victory.

**Perceptions of grantees’ understanding of Foundation guidelines and procedures.**

Current grantees’ level of understanding of Foundation processes and procedures was high (mean score=5.25 out of 6). Current grantee respondents showed high levels of agreement with the statements included in the scale (mean scores between 5.12 and 5.34). Around one-half of current grantees strongly agreed that the criteria for funding are clear and that the Foundation clearly communicates its accomplishments (see Figure 12). However, fewer, about 40% of these grantees, strongly agreed with the items measuring their understanding of Foundation expectations for their performance, and procedures for evaluation.

Figure 12: Current Grantees’ Understanding of Processes and Procedures (percentages, 139 survey participants)

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 1.44% missing cases (2 cases). Percentages for the last category are excluded from figure because of size. Responses range from 1-strongly disagree to 6-strongly agree.

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57 No open-ended comments were reported for this section.
58 All negative responses were collapsed to slightly disagree or less due to their low incidence.
Current grantees’ understanding of Foundation processes and procedures was not statistically different by organizational size or years of operation. However, there were statistically significant differences in grantees’ overall perceptions by organization’s years of funding and geographical scope. When examining results by geographical scope, statistically significant differences emerged on all four items analyzed. Compared to grantees in the Southwest, National grantees reported lower scores on items concerning the Foundation’s effective communication of its accomplishments and milestones, and the clarity of expectations for grantee performance and evaluation. For example, 48.0% of grantees in the Southwest strongly agreed that the expectations for performance were clear; but only 22.6% of National grantees reported a similar level of agreement. Additional differences were observed between grantees in the South and National grantees. Compared to grantees in the South, National grantees reported lower scores on items concerning the Foundation’s effective communication of its accomplishments and milestones, clarity of its expectations for grantee performance and evaluation, and clarity of its funding criteria. For example, 56.8% of grantees in the South strongly agreed that the criteria for funding were clear; but only 32.3% of National grantees reported a similar level of agreement.

When examining results by years of funding received, statistically significant differences emerged for all items concerning the grantees’ understanding of processes and procedures. As years of funding increased, so did scores on all four items. For example, 20.4% of grantees receiving 6 or fewer years of funding strongly agreed that expectations for grantee performance are clear; but 40.9% and 54.2% of those receiving between 6 and 9 years and more than 9 years, respectively, reported similar levels of agreement. Similarly, 31.5% of grantees receiving 6 or fewer years of funding strongly agreed that the criteria for funding are clear; but 45.5% and
68.8% of those receiving between 6 and 9 years and more than 9 years, respectively, reported similar levels of agreement.

**Perceptions of relations with Foundation personnel.** Current grantee respondents’ overall perceptions of their relationships with Foundation personnel were overwhelmingly positive (mean score=5.45 out of 6), showing high levels of agreement with the statements included in the scale (mean scores equaled to 5.45). Around 55% of current grantees strongly agreed with items concerning Foundation personnel’s level of responsiveness and knowledge (see Figure 13).

Figure 13: Current Grantees’ Perceptions of Relations with Foundation Personnel (percentages, 139 survey participants)

<table>
<thead>
<tr>
<th>Staff is knowledgeable about the Foundation’s practices and procedures</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Slightly agree</th>
<th>Slightly disagree or less</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>55.4</td>
<td>38.5</td>
<td>3.9</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Staff is responsive to my requests and concerns</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Slightly agree</th>
<th>Slightly disagree or less</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>56.2</td>
<td>37.7</td>
<td>3.1</td>
<td></td>
</tr>
</tbody>
</table>

Note: Percentages add to a 100, based on valid survey responses; 6.47% missing cases (9 cases). Percentages for the last category are excluded from figure because of size. Responses range from 1-strongly disagree to 6-strongly agree.\(^{59}\)

Current grantees’ perceptions of the responsiveness and knowledge of Foundation staff were consistent across organization size and years of operation. When examining grantees’

\(^{59}\) All negative responses were collapsed to slightly disagree or less due to their low incidence.
perceptions of Foundation staff by years of funding and geographical scope, however, statistically significant differences emerged. National grantees reported less positive perceptions of Foundation staff concerning their responsiveness and knowledge than grantees in the South and the Southwest. Also, grantees in the Southwest reported more positive perceptions that those in the South. For example, 83.3% of Southwest grantees strongly agreed that Foundation personnel are responsive to participants’ requests or knowledgeable about Foundation practices and procedures. However, only 38.2% and 60.5% of National grantees and grantees in the South, respectively, strongly agreed that Foundation personnel are responsive.

There were also statistically significant differences in current grantees’ perceptions of Foundation staff responsiveness, but not on their levels of knowledge, by years of funding received. Specifically, about 39% of grantees receiving 6 or fewer years of funding strongly agreed with the item concerning the responsiveness of Foundation staff, whereas this percentage increased to 68.6% and 76.9% for grantees who had received between 9 and 12 years of funding or more than 12 years of funding, respectively. Thus, as years of funding increased so did grantees’ perceptions of the responsiveness of Foundation staff.

Current grantees’ responses to the open-ended survey questions corroborate these findings. When describing Foundation personnel, grantees used adjectives such as “sincere,” “passionate,” “attentive,” “willing to support,” “available,” and “helpful.” The support of a program officer was clearly recognized by one grantee:

The program officer’s support has been an excellent line of support and communications as part of the overall grantee process and experience. In particular, as a new executive director …, the program officer has been a
tremendous asset in helping us with the transition. He is knowledgeable about the Foundation, the granting process, and is accessible and highly responsive.

When describing challenges, a few (about 10%) current grantees referred to the turnover in program officers as an area for improvement.

**Description of former grantees.** Findings for this section are derived from analyses describing former grantees’ characteristics and perceptions, and from comparing their survey responses to those of current grantees. From the 216 former grantees invited to participate, 64 responded to the survey (response rate= 29.63%). The results included in this section should be considered exploratory rather than conclusive because of limited statistical power resulting from the low response rate and missing data (for some variables, missing cases reached 20%). Furthermore, because of the small sample size and missing cases, no sub-group analyses (e.g., by geographical scope for example) could be estimated. In spite of these limitations, the findings provide insights into the perceptions of the Foundation’s former grantees. Figures supporting this narrative are located in Appendix 5.

**Characteristics of former grantees,** Former grantees are diverse in terms of their geographical scope and main platform issues. Almost half of former grantees participating in the survey were National grantees (23.4%) or from Washington State (21.9%). About one third of former grantees who responded to the survey were from the South (17.2%) and West (15.6%). Less than 15% of former grantees were from the Southwest or Midwest. Compared to current grantees, former grantees included fewer organizations from the South and more organizations from Washington State. Geographical differences between former and current grantees reflect

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60 The Home State Fund, a $1 million per year fund to support organizations based in Washington State, was phased out in 2012.
the Foundation’s strategic decision to focus on the states with the highest concentrations of poverty, which are primarily in the South.  

From the platform issues listed in the survey, education (45.3%), and youth engagement (35.9%) were reported most frequently by former grantees. However, the majority (62.5%) of former grantees selected “other” as one of their main focus issues. Among the most commonly reported issues categorized as “other” were civic engagement/ community development, including community organizing, movement building, and empowering families and communities (40.0%); family, children, and youth, including youth leadership, children with disabilities, and fatherhood (25.0%); and racial justice (17.5%), including Black power, Native American youth, building capacity in Black communities, and racial equity.

Perceptions of former grantees. As expected, there were statistically significant differences for all perception scales and items between former and current grantees. On average, former grantees reported less positive perceptions than current grantees. It is very plausible that these organizations’ perceptions were influenced by the fact that they are no longer receiving financial support from the Foundation. It was clear from some of the open-ended survey responses that several former grantees regretted the loss of funding and “the partnership [they] used to have” with the Foundation.

Even though some former grantees accepted the Foundation’s decision to stop funding their work, they shared their desire to receive non-financial support. One grantee from the Washington State area explained:

The Foundation is a national organization and we understand the methodology around the communities that are financially supported in other regions, however.

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61 Bishaw, 2014
MCF is based in Washington State. The Foundation could do more to leverage its work to assist organizing efforts in the State to shift systems from the programs and services approach that operates out of the assumption that people are broken and services will fix them to an approach that develops the leadership of people to challenge systems to transform. To be clear, we are not asking for financial support for this region, we are asking MCF to re-connect with the work that it previously supported. The work has continued in very powerful ways. MCF has been responsive to a portion of the request, but we really need support to think through what that might look like at the grassroots level.

Although former grantees’ general impressions of the Foundation were less positive than current grantees, their scores for the “general impressions” scale reflected their respect and appreciation for the Foundation’s work (mean score=4.96 out of 6). Overall, former grantees considered the Foundation as a trustworthy organization that is doing important work to improve the lives of poor families. The following quote from a former grantee reflects the deep sense of appreciation shared by several former grantees,

> Although our organization no longer qualifies for grant support, we remain highly appreciative to the Foundation for its years of past support, which enabled us to change many conditions for the betterment of our residents’ lives. …We will always be highly thankful for the unparalleled support and successful experience we had with the Foundation.

Besides sharing positive general impressions of the Foundation, former grantees reported somewhat positive perceptions of their shared goals and alignment (mean overall score=4.45 out of 6), and the Foundation’s staff (mean=4.65 out of 6). Appreciation of Foundation staff was also
clear in the open-ended questions. One former grantee wrote, “I have not been connected to the work for years, but I have a lot of respect for…the staff, the mission and the way that the Foundation does its work.”

Aside from general impressions of the Foundation, former grantees’ scores on all remaining scales were predictably less positive. Former grantees reported less positive perceptions of understanding of Foundation processes and procedures (mean score=4.35 out of 6) and the organizational support received from the Foundation (mean score=4.14 out of 6). The lowest levels of agreement for former grantees were observed regarding their perceptions about the Equal Voice strategy (mean score=3.97 out of 6), and the Foundation’s understanding of their organizations (mean=4.01 out of 6). The following section summarizes and discusses implications of the evaluation’s key findings.
Summary of Key Findings and Areas for Continued and Future Work

Summary of Key Findings

Qualitative and quantitative data analyses generated several findings about participants’ perceptions of the Foundation’s activities and outcomes as summarized below.

**Summary of findings from Foundation leaders and staff, and network weavers.**

Foundation leaders and staff, and network weavers provided insights into the Foundation and its overall performance by discussing three key organizational elements.

- **Organizational climate** - Participants identified mission, collaboration, diversity, and support as key elements of the Foundation’s climate positively influencing their professional activities, engagement, and satisfaction.

- **Perceptions and support of grantees** - Participants favorably viewed grantees and the Foundation’s support of grantees’ work, especially the long-term general funding and the “ask, listen, act” brand promise. Each was seen as positively impacting movement building and distinguishing the Foundation as unique in the field of philanthropy. However, some respondents noted that not all grantee organizations have been able to meet the Foundation’s requirements for continued funding, and the difficulty of terminating their involvement with these organizations.

- **Accomplishments and areas of impact** - While acknowledging that the Foundation’s mission is not complete; participants identified several significant accomplishments and areas of impact that have moved the Foundation closer to its goal of establishing a transformative movement of poor families. These were described as: 1) policy impact at the state and local levels; 2) network development, specifically the expansion of regional networks and the creation of the network weaver position; 3) leadership development, including an emphasis on youth leaders and the growth of a leadership pipeline for
community advocates; 4) strategic communications such as the award winning online paper *Equal Voice News*; 5) the incubation and launch of a membership organization to complement and expand the Foundation’s work, and 6) influence on the field of philanthropy as suggested by changes in the funding priorities and strategies of other major foundations. Of note, three of the accomplishments identified by participants (policy impact, network development and leadership development) are used by the Foundation as indicators of progress for movement building within the Equal Voice framework. The other three accomplishments (strategic communications, incubation and launch of a membership organization, and influence on the field of philanthropy) are viewed by the Foundation as critical to advancing movement building and achieving its mission and long-term vision.

**Summary of grantee survey findings.** Current grantees’ perceptions of the Foundation’s mission, staff, and strategies were exceedingly positive, although slight differences in the responses of some grantees were found.

- **Perception of the Foundation** - Current grantees overwhelmingly valued and shared the Foundation’s mission and goals, and viewed the organization as trustworthy. Beyond funding, they valued the holistic nature of the Foundation’s general, long-term support, and appreciated the responsiveness and knowledge of its personnel. Former grantees, despite expressing disappointment about losing funding, also valued the Foundation’s mission and work, and indicated a desire to stay connected to the organization.

- **Perception of the Foundation’s impact on grantees’ work** - Current grantees recognized and valued the multi-faceted support provided by the Foundation.
Specifically, grantees appreciated the Foundation’s financial support and its assistance with capacity building and increasing the visibility of their work.

- **Perceptions of the Equal Voice strategy** - Current grantees’ perceptions of the Equal Voice strategy were generally positive. However, responses from a small group of current grantee respondents suggest the need for additional or clarifying information about the different strategies and tactics that share the Equal Voice brand.

- **Perceptions across geographical scope** - Responses from current grantees across different geographical regions were generally positive; yet, some variations were observed. Specifically, National grantees reported less positive scores on all the perception scales, including perceptions of support from and connection to the Foundation. These results, although not surprising given that National grantees are different from regional grantees in their scope and relations with the Foundation, may warrant further exploration.

- **Relevance of years of funding received.** Current grantees who have received Foundation funding for more years generally reported higher levels of knowledge and understanding of the Foundation’s guiding principles, approaches, guidelines, and procedures. They were also more likely to report that the Foundation understood their organizations’ goals, concerns, and challenges.

  These findings reveal commonalities across participant groups. Specifically, all participants valued the Foundation’s mission, funding approach, and grantee support, as well as acknowledged its impact on policies affecting poor families. Participants also identified common areas for the Foundation’s continued and future work.
Areas for the Foundation’s Continued and Future Work

Based on the evaluation’s findings, this section delineates five key areas for continued and future work: 1) leadership transitions; 2) Foundation/grantee/network weaver relationships; 3) communications; 4) evaluation; and 5) funding strategies and priorities.

Leadership Changes and Transitions

Well, I worry very much about the day that [the President and CEO] decides to retire…. She is a very unique person with really incredible vision so it will be difficult…. (Board member)

Organizational change consultant, William Bridges, makes a distinction between “change” and “transition.” He describes the former as an alteration or difference that occurs in the organizational environment. Successful transitions, however, are described as psychological, entailing a three phase process where people gradually accept change and the new practices and procedures that come with it. He describes the three stages of transition as: 1) Ending: letting go and dealing with loss; 2) Neutral Zone: the in-between time when the old is gone but the new isn’t fully operational; and 3) New Beginning: the emergence of new identities and new directions. Without a successful transition process, organizational changes often fail.

Change and transition are not new to the Marguerite Casey Foundation. Its successful management of staffing changes serves as illustration. Several study participants, including Foundation leaders, staff, and grantees, acknowledged prior difficulties with staff retention and described its negative effects on organizational functioning. Explanations for the turnover ranged from “personality differences” and lack of “professional chemistry” to “lack of fit” with the Foundation’s culture and mission. However, Foundation leaders and staff noted that while the

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63 Ibid
process may have been painful given the small size of the organization, the Foundation has made a successful transition and achieved equilibrium and a “new beginning.” One staff member explained: “We're now at a place that we have the right people…in the right positions. That's super exciting.”

Yet, as the opening quote suggests, the Foundation will inevitably face changes in its core leadership, which will present new and profound challenges for the organization. The founding President and CEO will at some point in the future step down, as will Board members who have been instrumental in launching the Foundation. Like with all organizations, staff transitions are also unavoidable. Finding new leaders to build on the Foundation’s successes and advance its mission will be a critical task confronting the organization. How these changes and transitions are managed will determine its future progress. Accordingly, the following steps described by leadership consultant, Marissa Tirona ⁶⁴ are instructive.

1. Clarify and communicate the purpose and outcome of the change;
2. Acknowledge what people might be losing as a result of the change and, to the extent possible, honor the past;
3. Provide relevant information as the transition progresses, including information about any temporary policies, organizational groupings, or reporting relationships that will help move individuals through the transition process; and
4. Encourage thoughtful experimentation and innovation during the transition.

In essence, by ensuring open communication, transparency, and collective reflection; and acknowledging that successfully responding to change is a psychological process which entails a sense of loss and uncertainty that must be honored, change can be generative for an organization.

⁶⁴ See Marissa Tirona, Managing Change and Transition in an Organizational Setting, 2012.
Given the imminence of leadership changes in the Foundation, this is a key area for its consideration and action.

**Foundation/Grantee/Network Weaver Relationships**

The Foundation acknowledges that in order to build a grassroots national movement to elevate the voices of poor families and generate a just society, strong and sustainable relationships with (and among) grantees are needed. This is evident in the Foundation’s key values, and commonly recognized by its staff. One member of the staff explained the relevance of building strong connections with grantees, and by extension, network weavers, in the following way:

The Foundation has this very important role in relationship building in order to break down the power barrier that exists between those who have and those who do not. [My] role as a program officer [is] to develop these relationships because they hold the key to eradicating poverty.

Thus, unlike other national foundations, the Marguerite Casey Foundation does not impose its own agenda on the organizations it funds. Rather, the Foundation supports grantees and networks in building connections to more effectively pursue their own aspirations and priorities. This support is deeply valued. As one network weaver shared:

I appreciate the way this Foundation operates. They support real organizing and they don't dictate how their grantees or their weavers do the work, nor are they afraid to support changing public policy – it is refreshing and exciting!

Yet, several grantees and network weavers identified areas for additional assistance.

While the Foundation provides general support which can be used to build internal

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communications capacity, and the Foundation’s communications staff provides webinars and editorial assistance, participants frequently cited communications as an area for additional support. For example, when explaining what the Foundation could do differently to facilitate their organization’s work, one grantee stated: “Provide capacity building support such as connecting to communications staff who could help with info graphics or other communications materials.” Another grantee added: “I need a clearer understanding of how to get the work we are doing promoted in Equal Voice social media and newspaper.” Similarly, a network weaver wrote, “The communications piece is a powerful piece. We need to develop more expertise in utilizing the many communication tools to better tell our stories to decision makers.”

Grantees and network weavers also expressed interest in more frequent interactions with Foundation personnel. As Buteau and Buchanan⁶⁶ argued, program officers, in particular, play a major role in building collaborative relationships with grantees and it is very important to have the right balance and frequency of interactions. Some grantees believed that the Foundation had achieved both. For example, one grantee wrote:

> Foundation staff have always been available for consultation and problem solving. They are not in some ivory tower with a theory of change they want us to implement in order to receive funds; they trust us and our work. That is huge and so different from other foundations and funders. Concurring, one network weaver explained, “The responsiveness of the Foundation staff is invaluable to the movement building work and activities that I conduct on a daily, weekly, monthly basis with the group.”

However, a smaller group of grantees and network weavers considered it important to have, “More regular conversations with program officers.” Similarly, network weavers expressed the need for more engagement with other network weavers as well as Foundation staff. Former grantees also expressed a desire to maintain spaces of interaction with the Foundation.

Thus, as the Foundation reflects on its future engagement with grantees and network weavers, type, balance, and frequency of support are areas for consideration.

**Communications**

Telling the story of a great grantee doing great work is great. Knowing who’s going to read it and then what they are going to do with it is also really important and may help determine where we tell that story (Board member).

The Foundation’s recognition of communications as a strategy, along with grantmaking, that is central to achieving its mission and vision has allowed it to make significant progress in this area. To further advance the Foundation’s communications strategy, participants identified three areas for continued and future work. One area is to help build the capacity of grantees and networks to better craft and communicate their “stories” to their supporters in order to grow their numbers and deepen their engagement. Another area is to review messaging and materials to ensure that all grantees understand the different strategies and tactics that share the Equal Voice brand (e.g. Equal Voice strategy and framework, Equal Voice networks, Equal Voice National Family platform, *Equal Voice News*, and Equal Voice Action). A third area is to identify communication strategies that will continue to broaden the Foundation’s audience and advance its agenda.
As noted by participants and the literature on organizational communications,\(^{67}\) this will require the communications team to develop a tactical plan to guide the continued development of its work. Thus, as the Foundation moves forward, thinking through how it will effectively meet its own communications needs as well as the needs of its grantees and networks should be a key focus. Acknowledging its significance, a Foundation staff member shared, “The question is: How do we make the work of Marguerite Casey more relevant? Where does the Foundation want to be recognized and how important are external audiences? As we get to the fifteenth year, I think we are going to try to establish that.”

**Evaluation**

Evaluation is not new to the Marguerite Casey Foundation. The Foundation’s Board and staff have thought deeply about this topic, and the grantmaking and evaluation team has engaged in a variety of assessment activities. These activities, including grant close out reports and grantee surveys, have focused on assessing the Foundation’s progress and that of grantees at the individual grantee level, the regional portfolio level, and the aggregate level.\(^{68}\) Of note, in 2008, in consultation with the Board, the Foundation identified five indicators of successful movement building within the Equal Voice strategy. These indicators-policy impact, family engagement, network development, organizational capacity building, and leadership development-have since guided the Foundation’s grantmaking and evaluation efforts. Operationalizing and establishing measures for these indicators that are meaningful to stakeholders across levels (i.e., individual grantee, regional portfolio, and aggregate) are critical tasks moving forward.

Multiple participants suggested that the Foundation should also evaluate its impact on the field of philanthropy. This is an important outcome in the Foundation’s updated theory of

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\(^{67}\) See the Achieve Network’s, *Communicating Internally and Externally*, 2011.

\(^{68}\) Personal communication, Cheryl Milloy, July 2016.
change, and measurements such as increased recognition of families as constituents rather than beneficiaries; prioritization of resources to support movement building that addresses poverty, increased provision of multi-year general operating support, and increased commitment to building diverse and inclusive institutions are being developed.\footnote{Ibid} Ultimately, the Foundation seeks to understand its impact on eradicating poverty, and this too should remain a focus of its evaluation plans. As one Board member noted, “The next move will be to consider how we bring specificity to the work of seeing families move out of poverty. We have some of that, but I think that we can bring even greater specificity to that work.”

Lastly, the Foundation should explore a variety of evaluation methods. It is increasingly recognized that traditional methods of evaluation are not sufficient when attempting to assess outcomes and impacts of complex social initiatives.\footnote{See, for example, Gopal, 2016} Rather, organizations must use traditional methods (e.g., surveys and interviews) as well as new and emerging methods (e.g., network analysis and systems mapping) to capture impact in a manner that acknowledges and respects the dynamic context in which social change initiatives operate. This is a continued responsibility of and opportunity for the Foundation as described by one Board member:

> When pursuing a strategy that is very different, we must be conscientious about constantly evaluating what we’re doing, why we’re doing it, how we’re doing it, and looking at what the data and evidence are telling us about our measures of success. If we believe it is true; then we continue with our strategy, we reiterate it, we refine it, and I think that we publicly make the argument as to why it is good. Not necessarily to convince everybody to do the same thing, but to put
information into the field for others to look at and decide what if anything they want to do with it.

**Funding Strategies and Priorities**

Over its 15 years, the Foundation has awarded about 1,500 grants worth a total of approximately $340 million,\(^1\) and successfully modeled how philanthropic organizations can facilitate movement building. It now faces the question of how to best utilize Foundation resources to maximize the movement’s growth and impact. Funding strategies and priorities lie at the center of this question. The Foundation currently funds almost 200 organizations that span five geographical areas, 13 regional Equal Voice networks and one National Equal Voice network. Grants average $300,000 for three-year renewable terms. Its target is for 80% of grant recipients to have annual revenues at or above $500,000, and for 20% of grant recipients to have annual revenues below this amount. Participants positively viewed the Foundation’s funding approach, specifically its long-term general operating support.

However, given the disproportionate poverty in the South and Southwest and the limited support for progressive social change movements,\(^2\) some participants advocate for even more focused concentration on these regions of the country. For example, a network weaver observed that several organizations in the South represented “the community’s voice and needs, yet few have substantial support,” thereby limiting the network’s expansion and consequently its “viability and sustainability.” Thus, even as the Foundation is one of the top 10 philanthropic organizations providing grants for domestic rural development,\(^3\) some believe that a more concentrated focus on this region would deepen the movement’s impact in a meaningful way.

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\(^3\) Ibid
Similarly, there was a discussion about the type of organizations that the Foundation should fund. A few participants would like to see the Foundation expand its support of smaller organizations with annual revenues that fall below $500,000. However, others are not in agreement, arguing that given the limited size and resources of the Foundation, its focus on larger, “cornerstone” organizations is more conducive to movement building.

Still others questioned whether larger portions of the Foundation’s budget should be directed toward initiatives other than grantmaking to expand its impact. Providing additional support to foundations interested in pursuing a movement building strategy was one suggestion. For example a Board member asked: “Do we continue to put 100% into grants, or would the same low-income families be better served if we took a chunk of that money for technical assistance on a model that other people can replicate and own and the number grows?” This strategy might expand the Foundation’s social capital as well as that of its grantees. Social capital is a complex but highly useful construct for understanding the role of relationships in empowering individuals and organizations to effect change in a variety of domains. Social capital can have bridging and linking functions. The function of bridging social capital is to build connections across different organizations to expand access to useful resources and information. Linking social capital is a form of bridging capital that intentionally connects organizations across asymmetrical lines of power. Strengthening bridging and linking social capital among its grantees and networks through ties and exchanges with other grantmaking organizations committed to movement building could expand the Foundation’s influence as well as the resources available to its grantee organizations.

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Another suggestion to expand the Foundation’s impact is to invest even more funds into youth leadership development to “keep young people connected” to the movement. A current grantee agreed with the need to continue and perhaps expand the Foundation’s existing focus on youth engagement and leadership development, writing:

We enjoy the [Sargent Shriver] Youth Warrior Against Poverty awards. It is hard to find meaningful opportunities like that to keep youth engaged, some of whom have been doing the work without much fanfare for several years.

Thus, as the Foundation seeks to enhance its impact in the decades to come, continued and future deliberations on funding strategies and priorities (to either revise or recommit to them) are recommended.
Conclusion

In its first 15 years, the Marguerite Casey Foundation has achieved substantial progress in the interconnected areas of organizational development and movement building. Regarding organizational development, the Foundation has:

- Established its mission, vision, and an overall strategy – Equal Voice;
- Developed innovative grantmaking guidelines that include general, long-term grants to support the work of cornerstone organizations that work across issues, races and ethnicities, regions, and egos to bring about change that improves the social and economic well-being of families;
- Evolved its theory of change, highlighting the importance of the overlapping strategies of communications and grantmaking to achieve the Foundation’s goals; and
- Identified five indicators of movement building progress within the Equal Voice framework to help guide its evaluations.

Additional progress has focused on movement building. Specifically, the Foundation has:

- Developed the Equal Voice National Family platform, a comprehensive agenda for policy change, with the guidance and input of tens of thousands of low-income families;
- Built 13 regional Equal Voice networks and one national Equal Voice network by providing support for network weavers;
- Developed a communications strategy and infrastructure that is synthesized with grantmaking to advance the Foundation’s mission; and
• Launched an independent, family-led membership organization, Equal Voice Action, to further advance its efforts.

These accomplishments embody key elements to movement building as described by policy consultants, Barbara Masters and Tori Osborne. These elements include *organizing an authentic base* of individuals and communities “affected by the social conditions that the movement is seeking to change” (p. 16); *vision and ideas* that provide a common narrative and clear objectives for the role of government; *alliances* that facilitate work across issues and organizations; and *an advocacy infrastructure* with a range of skills, resources, and expertise to close the gap between communities and the “seats of power” (p. 22). The Foundation’s Equal Voice strategy, grantmaking guidelines, strategic communications, development of the Equal Voice National Family platform, expansion of the Equal Voice networks; and incubation and launch of Equal Voice Action have created the conditions necessary for broader impact.

Areas of impact identified by participants include: 1) policy wins at the state and local levels; 2) leadership development, including an emphasis on youth leaders and the growth of a leadership pipeline for community advocates; and 3) influence on the field of philanthropy. Specifically, participants noted statewide policy wins such as Proposition 30 and Proposition 47 as well as local policy wins in the South and Southwest as evidence of impact. Participants also identified the Foundation’s role in building a pipeline for grassroots leaders to move into elected political positions, and its youth leadership initiatives as critical to movement building. Lastly, participants viewed recent changes in the funding priorities and strategies of other grantmaking organizations as evidence of the Foundation’s impact on the field of philanthropy. Foundation leaders and staff, network weavers, and current grantees participating in the evaluation strongly

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75 Masters and Osborne, 2010
identify with this work, are inspired by these accomplishments, and are proud to be part of a movement to eradicate poverty and create a more just society.

The immensity and complexity of movement building, however, require continued questioning (*ask*), evaluation (*listen*), and effort (*act*). The Foundation’s commitment to its brand promise—*ask, listen, act*—is evidenced in its ongoing innovation. For example, it is now taking a portion of its endowment to start a program-related investment (PRI) portfolio. Loren Renz, at the Foundation Center, defines a PRI as “a foundation investment to support a charitable project or activity involving the potential return of capital within an established time frame.” As stated by a staff member, this innovation reflects the Foundation’s current “financial and grantmaking expertise as well as its capacity to assess the social returns” on these investments.

To facilitate the Foundation’s continued innovation and progress, this report identifies five areas for future consideration: leadership changes and transitions; Foundation/grantee/network weaver relationships; communications; evaluation; and funding strategies and priorities. Attention to these areas will advance the Foundation’s efforts to achieve its bold and transformative vision. As described by Rick Docksai in *Inside Philanthropy*:

The Marguerite Casey Foundation has an ambitious vision of what can be accomplished for families, and the importance of families advocating on their own behalf for policies that improve their lives and those of their children. While many funders steer far clear of advocacy, preferring to invest in direct services, Marguerite Casey makes a point of aiming to shape the actions of government and business…One Holy Grail of smart grantmaking is successfully influencing how the real power centers in society approach problems.

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76 See, *Program Related Investments* at http://www.nhi.org/online/issues/89/proginv.html
77 *Inside Philanthropy*, June 8, 2015
The Foundation’s progress during its first 15 years has undoubtedly resulted from its courageous approach to philanthropy. Continuous improvement with an unwavering commitment to its vision and strategy will enable the Foundation to extend and deepen its impact on the lives and communities of poor families for years to come.
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Appendix 1 – Leadership Interview Protocol

1. How did you come to the position and why have you stayed?

2. What is unique about the Marguerite Casey Foundation?

3. The Foundation has gone through several milestones since its inception (particularly 2007-8 and 2012)-describe your feelings about this evolution.

4. Of which Foundation accomplishment(s) are you most proud?

5. What would you like to see the Marguerite Casey Foundation 1) become and 2) accomplish in the next 5 years? Ten (10) years?

6. What challenges has the Foundation experienced in instituting its mission and goals?

7. What would you like this evaluation to produce or generate for the Foundation?
Appendix 2 – Staff Interview and Focus Group Protocols

Individual Interview Protocol

1. What is your position at the Marguerite Casey Foundation? How long have you been working at the Foundation? What are your main roles and responsibilities?
2. How would you describe the Foundation’s mission and goals?
3. How do you see your role and responsibilities contributing to the mission and goals of the Foundation?
4. Are there aspects of the Foundation (e.g., organizational structure, personnel) that positively influence your work? Explain.
5. In your opinion, which of the Foundation’s accomplishment(s) have been most significant? What challenges has the Foundation faced in realizing these achievements?
6. What would you like to see the Marguerite Casey Foundation 1) become and 2) accomplish in the next 5 years?
7. Is there anything else you would like to share with us so that we can better understand the functioning of the Foundation?

Focus Group Interview Protocol

1. Brief introductions-first name, position, years at MCF.
2. In 3-5 words, how would you describe the Foundation’s mission?
3. What do you think has been the Foundation’s most significant accomplishment regarding its mission?
4. What do you think has been the organization’s most significant challenge in realizing its mission?
5. Think ahead five years. If you could write a newspaper headline describing the Foundation or an accomplishment of the Foundation, what would it be?
6. What else would you like to share about the Foundation as it reflects on its past and plans for its future?
Appendix 3 – Network Weaver Qualitative Survey

We are conducting a summative evaluation of the Marguerite Casey Foundation. We want to hear your voice and incorporate your perspectives. Please answer the following questions as best as you can and email your responses to us (msanders@umbc.edu or galindo@umbc.edu) no later than Friday, April 15, 2016. The survey is confidential, and no one at the foundation will see individual responses.

Thank you for your help!

1) How many years have you worked as a network weaver for the Marguerite Casey Foundation?

2) As a network weaver in your region, what do you believe are your three most important responsibilities? List and explain.

   a. ____________________________________________________________________________

   b. ____________________________________________________________________________

   c. ____________________________________________________________________________

3) Since becoming a network weaver, what are the primary ways that the Marguerite Casey Foundation has supported your work?

4) What could the Marguerite Casey Foundation do differently to further support your work as a network weaver?

5) What additional information about your role and work would you like to share with leaders of the Marguerite Casey Foundation?
Appendix 4 - Methodology of Grantee Survey

Survey data were collected between January and February, 2016. A confidential, online survey instrument was created to gather information about grantees’ perceptions of and experiences with the Marguerite Casey Foundation. The survey was created after an extensive review of administrative documents obtained from the Foundation and its website. To increase its content validity, a draft of the survey was discussed with Foundation personnel and their input was included in the final version of the instrument. The survey included multiple-choice and short open-ended questions. Table 3 describes the different components of the survey.

Table 3: Components of the Grantee Survey 2016

<table>
<thead>
<tr>
<th>Components</th>
<th>Items</th>
<th>Range: 1, strongly disagree to 6, strongly agree Alpha=</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Perceptions of Foundation</td>
<td>1) The MCF supports activities that other grant foundations do not.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2) The MCF is making a difference in the lives of poor families</td>
<td></td>
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<tr>
<td></td>
<td>3) The MCF is very knowledgeable about issues facing poor families</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4) The MCF is a trustworthy organization</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Range: 1, strongly disagree to 6, strongly agree Alpha=0.81</td>
<td></td>
</tr>
<tr>
<td>Perceptions of Equal Voice Strategy</td>
<td>1) I understand the elements of the Foundation’s overall strategy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(Equal Voice)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2) The Foundation’s overall strategy (Equal Voice) has helped my</td>
<td></td>
</tr>
<tr>
<td></td>
<td>organization to better focus its work</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3) The Foundation’s overall strategy (Equal Voice) makes me feel like</td>
<td></td>
</tr>
<tr>
<td></td>
<td>my organization is part of a national movement</td>
<td></td>
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<tr>
<td></td>
<td>4) I know how the Foundation’s overall strategy (Equal Voice) was</td>
<td></td>
</tr>
<tr>
<td></td>
<td>developed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Range: 1, strongly disagree to 6, strongly agree Alpha=0.89</td>
<td></td>
</tr>
<tr>
<td>Perceptions of Shared Goals and Alignment</td>
<td>1) My organization shares the mission and goals of the MCF</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2) I clearly understand the mission and goals of the MCF</td>
<td></td>
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<tr>
<td></td>
<td>3) I believe the MCF is going in the right direction.</td>
<td></td>
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<tr>
<td></td>
<td>4) My organization is aware of the Foundation’s activities and</td>
<td></td>
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<tr>
<td></td>
<td>initiatives.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Range: 1, strongly disagree to 6, strongly agree Alpha=0.87</td>
<td></td>
</tr>
<tr>
<td>Perceptions of Support for</td>
<td>1) The MCF helps to bring visibility to my organization’s work.</td>
<td></td>
</tr>
<tr>
<td>Organizational Functioning</td>
<td>2) MCF grant funds help to make my organization’s work possible.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3) MCF grant funds have allowed my organization to deepen or expand</td>
<td></td>
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<tr>
<td></td>
<td>its work.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4) The MCF helps my organization network with other groups</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(including, but not limited to other grantees).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Range: 1, strongly disagree to 6, strongly agree Alpha=0.93</td>
<td></td>
</tr>
</tbody>
</table>
| Perceptions of Foundation Understanding of Grantees | 1) The MCF understands my organization’s goals  
2) The MCF understands the issues my organization addresses  
3) The MCF understands the concerns of my organization’s constituencies  
4) The MCF understands the challenges inherent in my organization’s work | Range: 1, strongly disagree to 6, strongly agree  
Alpha=0.95 |
| Perceptions of Grantee Understanding of Foundation Processes and Procedures | 1) The MCF expectations for grantee performance are clear  
2) The MCF procedures for evaluating grantee performance is clear  
3) The MCF’s criteria for funding are clear  
4) The MCF effectively communicates its accomplishments and milestones | Range: 1, strongly disagree to 6, strongly agree  
Alpha=0.91 |
| Perceptions of Relationships with Foundation Personnel | 1) The MCF staff is responsive to my requests and concerns.  
2) The MCF staff is knowledgeable about the Foundation’s practices and procedures. | Range: 1, strongly disagree to 6, strongly agree  
Alpha=0.83 |
| Organizations’ background information | 1) Which region of the country does your organization primarily serve? (Midwest; South; Southwest; West; Washington State; National; Other)  
2) What are the three main non-profit fields that best describe your organization? (Education, immigration reform, health care, employment/job training, housing, child care, criminal justice reform, food security/access to healthy food, environmental issues, LGBT rights, transportation, and elder care, and youth engagement, other)  
3) What year was your organization founded?  
4) How many paid full-time equivalent staff (non-volunteer) work for the organization?  
5) Is your organization currently being funded by the Marguerite Casey Foundation? (Yes; No)  
6) How many years in total have you received funding from the Marguerite Casey Foundation (including the current grant)? | |
| Participants’ background information | Race/ethnicity, age, and gender | |
participating organizations were current grantees (3.8% of missing data, 8 cases). Around one-fourth (24.1% and 23.2%, respectively) of all participating organizations were South or National grantees, and one-sixth (16.6% each) were grantees in the Southwest or West regions. Around one-tenth of the grantees served the Midwest or Washington State (10.0% and 7.1%). Although the grantees are extremely diverse in terms of their involvement in different platform issues, the highest levels of involvement were observed in education (42.2%), youth engagement (34.1%), immigration reform (27.0%), criminal justice reform (18.5%) and employment/job training (16.1%). The platform issues with the lowest levels of involvement were elder care (2.8%), LGBT rights (3.8%), and transportation (4.3%).

In addition, participating grantees were diverse in terms of their size, years of operation and years of funding received. In general participating grantees were small organizations; around one-half (51.8%) had 10 or fewer employees and one-fifth (22.1%) had 25 or more. The distribution of grantees was consistent across years of operation. Around 25% were founded in 1980 or earlier; 29.9% were founded between 1990 and 2000; and 23.2% were founded after 2000. Around half of the sample (55.3%) received 6 or fewer years of funding and 27.1% received between 9 and 12 years of funding.

To analyze data, we first created the seven scales or components mentioned before by averaging individual items from each component. To measure the reliability of the scales, we used Cronbach’s alpha, which is a measure of overall consistency of scores. All scales demonstrated high reliability with Cronbach’s alphas ranging from 0.81 to 0.95.

Then, descriptive statistics (mean and standard deviations and frequencies) of overall scores (for each of the survey components) and items were conducted. To do this, we first
recoded all scales and items from a 6-point scale to a 3-point scale because of the original distributions of variables, which were skewed to the left or negatively skewed.

In the third stage of data analysis, we examined the extent to which patterns of survey findings were consistent across key dimensions (e.g., funding status – current or former grantees, geographical scope – South, Southwest, West, Midwest, and National, organization size, years of experience, and years of funding). For these analyses we utilized t-tests, regression analysis, or chi-squared statistics depending on the level of measurement of variables. It is important to note that because of sample size restrictions, these results are exploratory. For example, only 15 and 22 current grantees from the Midwest and West respectively responded to the survey. Because of small sample sizes by geographical scope of current grantees, we used p-value<0.1 as the critical threshold.

In the final stage of data analysis, we integrated qualitative findings (from responses to the open-ended survey questions) with quantitative results to more fully capture grantees’ perceptions. Grantees’ responses to three open-ended questions: 1) In addition to general support funds, what is the primary way that the MCF has supported your work?; 2) What could the MCF do differently to further support your organization’s work?; and 3) What additional information would you like to share with leaders of the MCF? By incorporating participants’ responses to these three questions, we gained a more complex understanding of their perspectives and opinions.
Appendix 5 - Figures Showing Detailed Findings for Former Grantees

Equal Voice Platform Issues

Figure 14: Differences between Current and Former Grantees’ in Most Frequent Equal Voice Platform Issues Identified (percentages, 139 current vs. 64 former grantees)

Note: Statistically significant proportion differences are represented by an * ($\chi^2$ for LGBT= 7.89, p-value<0.05; $\chi^2$ for immigration reform= 11.68, p-value<0.01s; and $\chi^2$ for other= 8.13 p-value<0.05). Percentages based on valid survey responses; total may exceed 100% due to rounding.
<table>
<thead>
<tr>
<th>“Other” Issues</th>
<th>Occurrences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Civic engagement/Community development, (including community engagement and organizing, movement building and empowerment)</td>
<td>40.0</td>
</tr>
<tr>
<td>Families and Youth, including youth leadership, Native American youth, youth capacity building, children with disabilities, children’s museums, and fatherhood and families</td>
<td>25.0</td>
</tr>
<tr>
<td>Racial justice, including Black leadership, racial justice and equity, Native American</td>
<td>17.5</td>
</tr>
<tr>
<td>Art and culture; research, journalism, and communications; disabilities, women’s right; poverty; worker’s rights; philanthropy; land loss and protection; human and equal rights; basic needs; safety net; empowering education; loans</td>
<td>Less than 10</td>
</tr>
</tbody>
</table>

Note: Percentages may exceed 100% due to rounding; some participants reported more than one “other” issue.

**Characteristics of Organizations**

Figure 15: Differences between Current and Former Grantees in Number of Paid Full-time Staff (percentages; 139 current vs. 64 former grantees)

Note: No statistically significant differences in size between former and current grantees. Percentages based on valid survey responses; total may exceed 100% due to rounding; 3.1% missing cases for former grantees (2 cases).
Figure 16: Differences between Current and Former Grantees in Number of Years in Operation (percentages; 39 current vs. 64 former grantees)

Note: No statistically significant differences in size between former and current grantees. Percentages based on valid survey responses; total may exceed 100% due to rounding; 4.7% missing cases for former grantees (3 cases).

Funding Received

Figure 17: Differences between Current and Former Grantees in Total Years of Funding Received (percentages; 139 current vs. 64 former grantees)

Note: Statistically significant proportion differences were found between current and former grantees (t-value= -5.8, p-value<0.0001). Percentages based on valid survey responses; total may exceed 100% due to rounding; 12.5% missing cases for former grantees (8 cases).
Perceptions of Former Grantees

Figure 18: Former Grantees’ General Impressions of the Foundation (percentages, 64 survey participants)

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 14.06% missing cases (9 cases).

Figure 19: Current Grantees’ General Impressions of the Foundation (percentages, 139 survey participants)

Note: 1.44% missing cases (2 cases). Percentages for the last category are excluded from figure because of size.
Figure 20: Former Grantees’ Perceptions of Equal Voice Strategy (percentages, 64 survey participants)

- Equal Voice has helped my organization to better focus its work: 10.2% Strongly Agree, 32.7% Agree, 10.2% Slightly agree, 46.9% Slightly disagree or less
- Equal Voice makes me feel like my organization is part of a national movement: 10.4% Strongly Agree, 25.0% Agree, 20.8% Slightly agree, 43.8% Slightly disagree or less
- I know how the Equal Voice strategy was developed: 19.2% Strongly Agree, 26.9% Agree, 23.1% Slightly agree, 30.8% Slightly disagree or less
- I understand the elements of the Equal Voice strategy: 16.0% Strongly Agree, 44.0% Agree, 20.0% Slightly agree, 20.0% Slightly disagree or less

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 18.8% missing cases (12 cases).

Figure 21: Current Grantees’ Perceptions of Equal Voice Strategy (percentages, 139 survey participants)

- Equal Voice has helped my organization to better focus its work: 28.4% Strongly Agree, 38.6% Agree, 21.3% Slightly agree, 11.8% Slightly disagree or less
- Equal Voice makes me feel like my organization is part of a national movement: 34.7% Strongly Agree, 32.3% Agree, 20.5% Slightly agree, 12.6% Slightly disagree or less
- I know how the Equal Voice strategy was developed: 35.9% Strongly Agree, 38.3% Agree, 12.5% Slightly agree, 13.3% Slightly disagree or less
- I understand the elements of the Equal Voice strategy: 45.0% Strongly Agree, 37.2% Agree, 10.1% Slightly agree, 7.8% Slightly disagree or less

Note: 6.5% missing cases. (9 cases).
Figure 22: Former Grantees’ Perceptions of Shared Goals and Alignment (percentages, 64 survey participants)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Slightly agree</th>
<th>Slightly disagree or less</th>
</tr>
</thead>
<tbody>
<tr>
<td>I believe the MCF is going in the right direction.</td>
<td>18.0</td>
<td>28.0</td>
<td>36.0</td>
<td>18.0</td>
</tr>
<tr>
<td>My organization is aware of the Foundation’s activities and initiatives</td>
<td>14.0</td>
<td>36.0</td>
<td>24.0</td>
<td>26.0</td>
</tr>
<tr>
<td>I clearly understand the mission and goals of the MCF</td>
<td>21.2</td>
<td>36.5</td>
<td>23.1</td>
<td>19.2</td>
</tr>
<tr>
<td>My organization shares the mission and goals of the MCF</td>
<td>30.6</td>
<td>28.6</td>
<td>32.7</td>
<td>8.2</td>
</tr>
</tbody>
</table>

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 18.8% missing cases (12 cases).

Figure 23: Current Grantees’ Perceptions of Shared Goals and Alignment (percentages, 139 survey participants)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Slightly agree</th>
<th>Slightly disagree or less</th>
</tr>
</thead>
<tbody>
<tr>
<td>I believe the MCF is going in the right direction.</td>
<td>43.8</td>
<td>39.8</td>
<td>14.1</td>
<td>2.2</td>
</tr>
<tr>
<td>My organization is aware of the Foundation’s activities and initiatives</td>
<td>45.7</td>
<td>40.9</td>
<td>9.5</td>
<td>4.1</td>
</tr>
<tr>
<td>I clearly understand the mission and goals of the MCF</td>
<td>48.1</td>
<td>42.6</td>
<td>5.4</td>
<td>4.8</td>
</tr>
<tr>
<td>My organization shares the mission and goals of the MCF</td>
<td>63.0</td>
<td>33.1</td>
<td>3.2</td>
<td>0.8</td>
</tr>
</tbody>
</table>

Note: 6.5% missing cases (9 cases). Percentages for the last category are excluded from figure because of size.
Figure 24: Former Grantees’ Perceptions of Support for Organizational Functioning (percentages, 64 survey participants)

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 14.06% missing cases (9 cases).

Figure 25: Current Grantees’ Perceptions of Support for Organizational Functioning (percentages, 139 survey participants)

Note: 1.44% missing cases (2 cases). Percentages for the last category are excluded from figure because of size.
Figure 26: Former Grantees’ Perceptions of Foundation Understanding of Grantees (percentages, 64 survey participants)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Slightly agree</th>
<th>Slightly disagree or less</th>
</tr>
</thead>
<tbody>
<tr>
<td>The MCF understands the challenges inherent in my organization’s work</td>
<td>7.8</td>
<td>23.5</td>
<td>31.4</td>
<td>37.3</td>
</tr>
<tr>
<td>The MCF understands my organization’s goals</td>
<td>13.5</td>
<td>21.2</td>
<td>25.0</td>
<td>40.4</td>
</tr>
<tr>
<td>The MCF understands the concerns of my organization’s constituencies</td>
<td>23.1</td>
<td>19.2</td>
<td>30.8</td>
<td>26.9</td>
</tr>
<tr>
<td>The MCF understands issues my organization addresses</td>
<td>19.6</td>
<td>27.5</td>
<td>27.5</td>
<td>25.5</td>
</tr>
</tbody>
</table>

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 18.8% missing cases (12 cases).

Figure 27: Current Grantees’ Perceptions of MCF’s Understanding of Grantees (percentages, 139 survey participants)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Slightly agree</th>
<th>Slightly disagree or less</th>
</tr>
</thead>
<tbody>
<tr>
<td>The MCF understands the challenges inherent in my organization’s work</td>
<td>40.0</td>
<td>41.5</td>
<td>13.9</td>
<td></td>
</tr>
<tr>
<td>The MCF understands my organization’s goals</td>
<td>51.5</td>
<td>41.5</td>
<td>4.6</td>
<td></td>
</tr>
<tr>
<td>The MCF understands the concerns of my organization’s constituencies</td>
<td>55.7</td>
<td>29.8</td>
<td>10.7</td>
<td></td>
</tr>
<tr>
<td>The MCF understands issues my organization addresses</td>
<td>57.7</td>
<td>33.1</td>
<td>6.9</td>
<td></td>
</tr>
</tbody>
</table>

Note: 5.76 % missing cases (8 cases). Percentages for the last category are excluded from figure because of size.
Figure 28: Former Grantees’ Understanding of Processes and Procedures (percentages, 64 survey participants)

<table>
<thead>
<tr>
<th>Category</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Slightly agree</th>
<th>Slightly disagree or less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procedures for evaluating grantee performance are clear</td>
<td>10.6</td>
<td>38.3</td>
<td>17.0</td>
<td>34.0</td>
</tr>
<tr>
<td>Expectations for grantee performance are clear</td>
<td>14.6</td>
<td>39.6</td>
<td>18.8</td>
<td>27.1</td>
</tr>
<tr>
<td>Effectively communicates its accomplishments and milestones</td>
<td>22.2</td>
<td>48.2</td>
<td>16.7</td>
<td>13.0</td>
</tr>
<tr>
<td>Criteria for funding are clear</td>
<td>12.8</td>
<td>38.3</td>
<td>12.8</td>
<td>36.2</td>
</tr>
</tbody>
</table>

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 14.06% missing cases (9 cases).

Figure 29: Current Grantees’ Understanding of Processes and Procedures (percentages, 139 survey participants)

<table>
<thead>
<tr>
<th>Category</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Slightly agree</th>
<th>Slightly disagree or less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procedures for evaluating grantee performance are clear</td>
<td>36.2</td>
<td>47.2</td>
<td>11.0</td>
<td></td>
</tr>
<tr>
<td>Expectations for grantee performance are clear</td>
<td>37.8</td>
<td>51.2</td>
<td>8.7</td>
<td></td>
</tr>
<tr>
<td>Effectively communicates its accomplishments and milestones</td>
<td>48.5</td>
<td>33.8</td>
<td>13.2</td>
<td></td>
</tr>
<tr>
<td>Criteria for funding are clear</td>
<td>48.8</td>
<td>38.6</td>
<td>8.7</td>
<td></td>
</tr>
</tbody>
</table>

Note: 1.44% missing cases (2 cases). Percentages for the last category are excluded from figure because of size.
Figure 30: Former Grantees’ Perceptions of Relations with Foundation Personnel (percentages, 64 survey participants)

Note: Percentages based on valid survey responses; total may exceed 100% due to rounding; 18.75 % missing cases (12 cases).

Figure 31: Current Grantees’ Perceptions of Relations with Foundation Personnel (percentages, 139 survey participants)

Note: 6.47% missing cases (9 cases). Percentages for the last category are excluded from figure because of size.