

EXECUTIVE SUMMARY

In early 2007, Bella Vista Foundation engaged a professional evaluator, Rachel Lanzerotti, to design and implement an online survey of grantee organizations and denied applicants. The goals of this first, independent evaluation were to affirm strengths and identify areas for improvement in the Foundation's communications, guidelines, application, decisions, and reporting processes related to grant making.

We surveyed grantee organizations and denied applicants about the Foundation's granting process. The 70 organizations that participated in the survey were split evenly between the two program areas of Ecosystem Restoration and Early Childhood, with an overall response rate of 61%, and make up a fairly representative sample by years of funding and amounts of funding received.

- The greatest proportions of respondents are current grantees, which have applied for and received one year of funding in the range of \$50,000-75,000.
- One-quarter (25%) of survey respondents have at one time been denied funding, and 17% of respondents have never received funding from the Foundation.

Survey responses demonstrate that the Foundation is exemplary in the areas of its guidelines and application process, grant report process, and overall communications.

- In the area of guidelines and application, respondents rated highest the Foundation's site visits and the responsiveness of staff members.
- In the area of grant reports, respondents valued the helpfulness of reports as tools for evaluation and/or reflection.
- In the area of overall communication, respondents rated highest being treated with courtesy and respect by foundation staff.

Respondents rate Bella Vista Foundation favorably even in comparison with other private foundations, describing Bella Vista Foundation as "better than most" in its application process (52% of respondents) and overall communication (56%), and "about the same" in its reporting process (59%). Participating organizations particularly praised both staff and board members for their responsiveness, accessibility, and courtesy, and they acknowledged the Foundation for being "visionary," "focused," and "purposeful."

At the same time, if it wants to improve on its overall success, the evaluation findings suggest two areas to which the Foundation could be even more attentive. The first is communication of its priorities, expectations, and changes in strategic direction and guidelines that may impact grant applicants. This issue may have surfaced in the evaluation because the Foundation's focus and guidelines recently have been in transition in both program areas. The second is the area of reporting, including the timing, instructions, and content of grant reports,

which, compared with other components of the granting process, received a relatively lukewarm review.

We asked survey respondents to tell us how the Foundation currently adds value to their work, and two areas that stand out are convening grantees and helping them form partnerships.

- Over one-third (36%) of respondents reported that the Foundation adds value by convening grantees to share best practices and ideas.
- One-third (34%) of respondents said that Bella Vista Foundation has helped their organization form partnerships and/or coalitions.
- Most respondents in the Early Childhood program area reported that past convenings have been useful for networking, by connecting with other providers and sharing information.

With generally high marks and praise from community organizations, the next set of questions for the Foundation concerns how much more to undertake. We heard suggestions for how the Foundation could do more: to share models from other geographic areas; to build connections among grantee organizations, for example via communications such as an electronic newsletter or announcements on the Foundation's website; and to build capacity, for example by providing assistance with proposals, reporting, and other grant-related activities. Participants told us that they would welcome opportunities to provide input, as the Foundation continues to develop its priorities and guidelines.

- Over three-quarters (76%) of respondents from both program areas would like the Foundation to add value to their work in the future by sharing relevant models from other geographic areas.
- A higher proportion of Early Childhood organizations (76%) continue to show interest in convenings to share best practices and ideas, as compared with Ecosystem Restoration organizations (53%), perhaps because these organizations already have experienced the value of such gatherings.

Many respondents took the opportunity to praise Bella Vista Foundation staff and board members, commenting on their knowledge of the field and responsiveness. Overall, the Bella Vista Foundation is proud of the results of its first evaluation effort and expresses its gratitude to the participating organizations.

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