

INCORPORATING BENEFICIARY PERCEPTIONS INTO FOUNDATION DECISION MAKING

March 13, 2012

Grantmakers for Effective Organizations
2012 National Conference
Seattle, Washington



THE CENTER FOR
EFFECTIVE PHILANTHROPY

Better Data. Better Decisions. Better Philanthropy.



Audience Input

- ❖ What brought you to this session?
- ❖ How many of you collect beneficiary feedback currently to inform your grant-making?
 - ❖ Can you share some examples of the types of feedback that you collect? (e.g. data, stories)



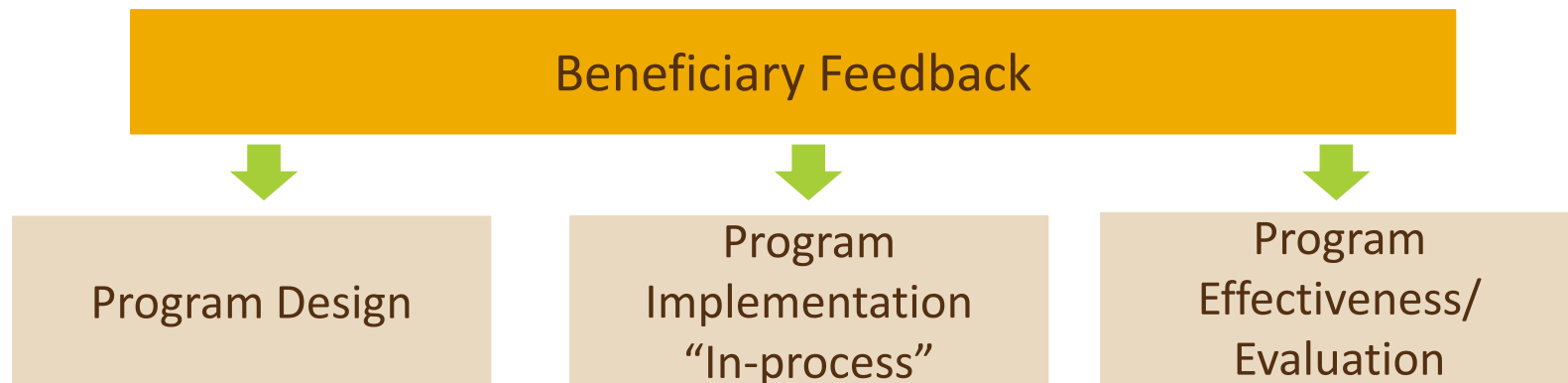
Goal For Today

Explore the potential for beneficiary feedback to inform funders' decision-making and processes:

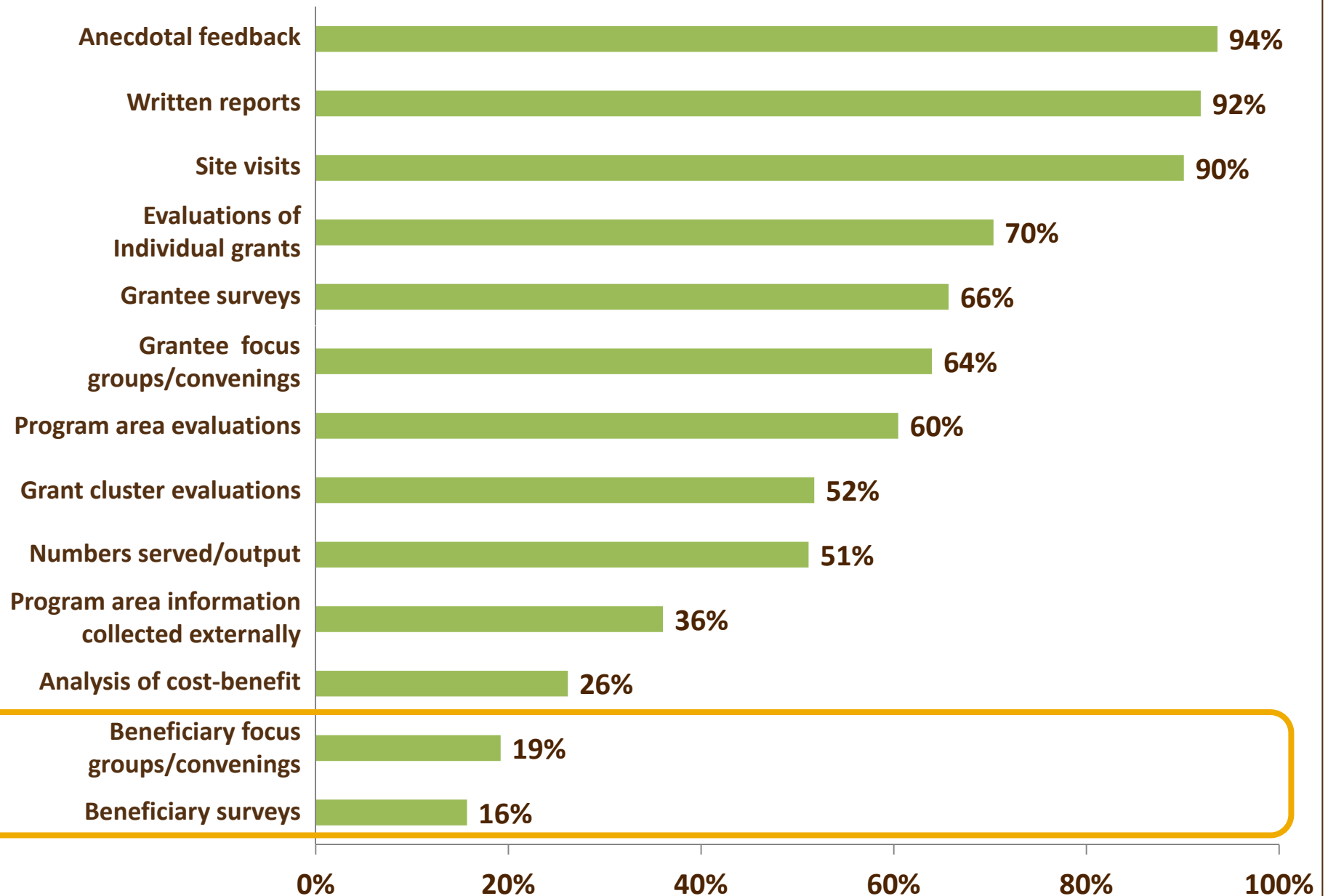
- Two case studies
- Small group discussions

What We Mean by Beneficiary Feedback

Beneficiary: Clients, “end-users,” primary constituents, those individuals that we are ultimately working to serve



What types of information are used to assess the effectiveness of the Foundation's programmatic work?



Source: CEP, *The State of Foundation Performance Assessment: A Survey of Foundation CEOs*, 2011.

Preconditions for Advancing Beneficiary Perceptions As Part of Ongoing Feedback Tools

The Will

Belief in the value and relevance of what beneficiaries have to say

The Way

Effective, easy tools for collecting and sharing beneficiary perceptions

The Why

Connection between beneficiary perspectives and organizations' goals, strategies, and outcomes

The Why Now

Systematic incentives for integrating beneficiary perspectives into feedback mechanisms



Discussion Questions

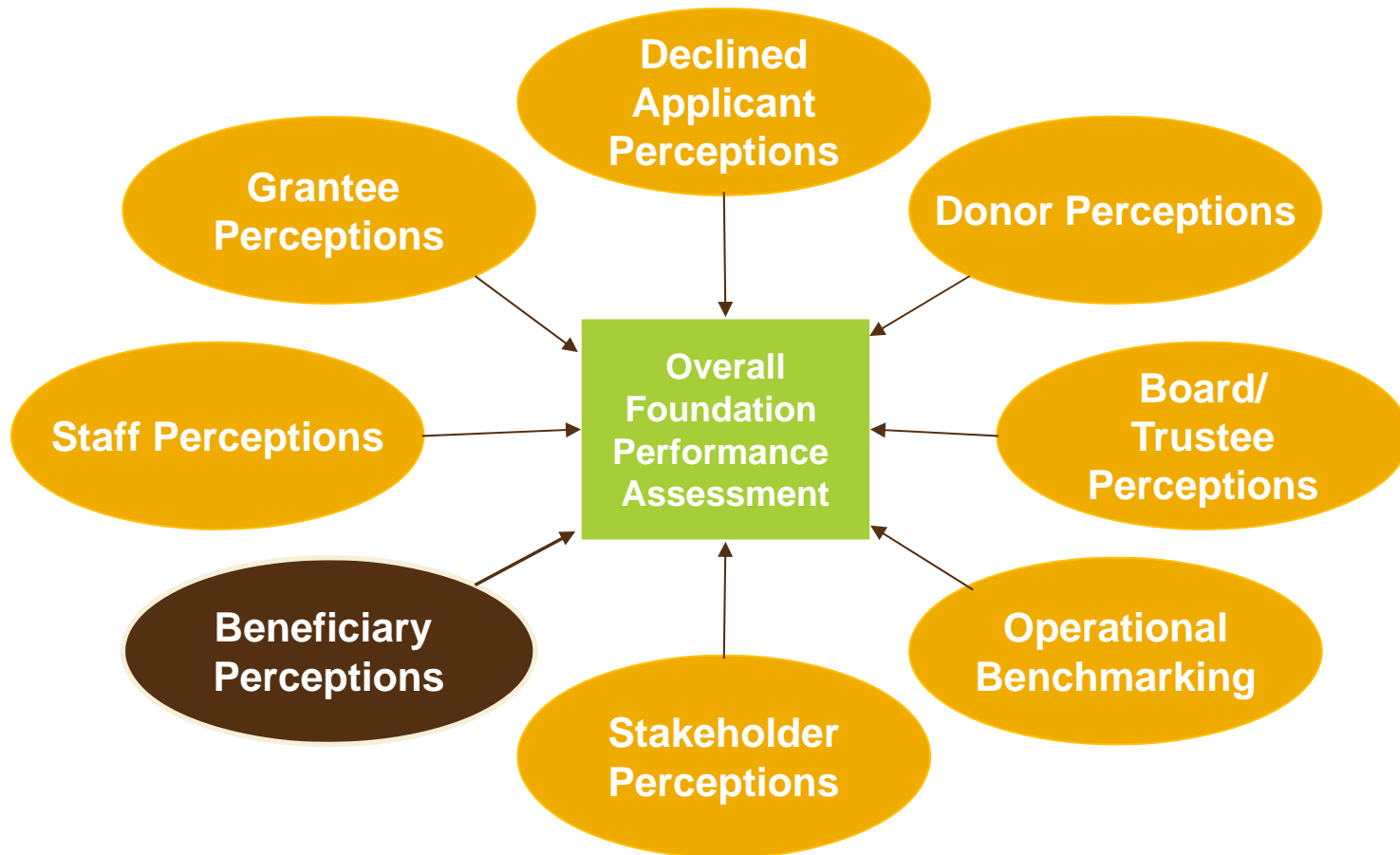
- ❖ Why do you think foundations do not more routinely collect beneficiary perceptions?



A Case Study on Beneficiary Feedback

YOUTH TRUTH

Constituent Feedback Gathered by CEP



Audiences Served by YouthTruth

PHILANTHROPIC FUNDERS

EAST BAY COMMUNITY FOUNDATION

STUART FOUNDATION

INVESTING IN CHILDREN & YOUTH TO CREATE LIFELONG IMPACT

BILL & MELINDA
GATES foundation



SCHOOL NETWORKS AND DISTRICTS



HIGH SCHOOLS

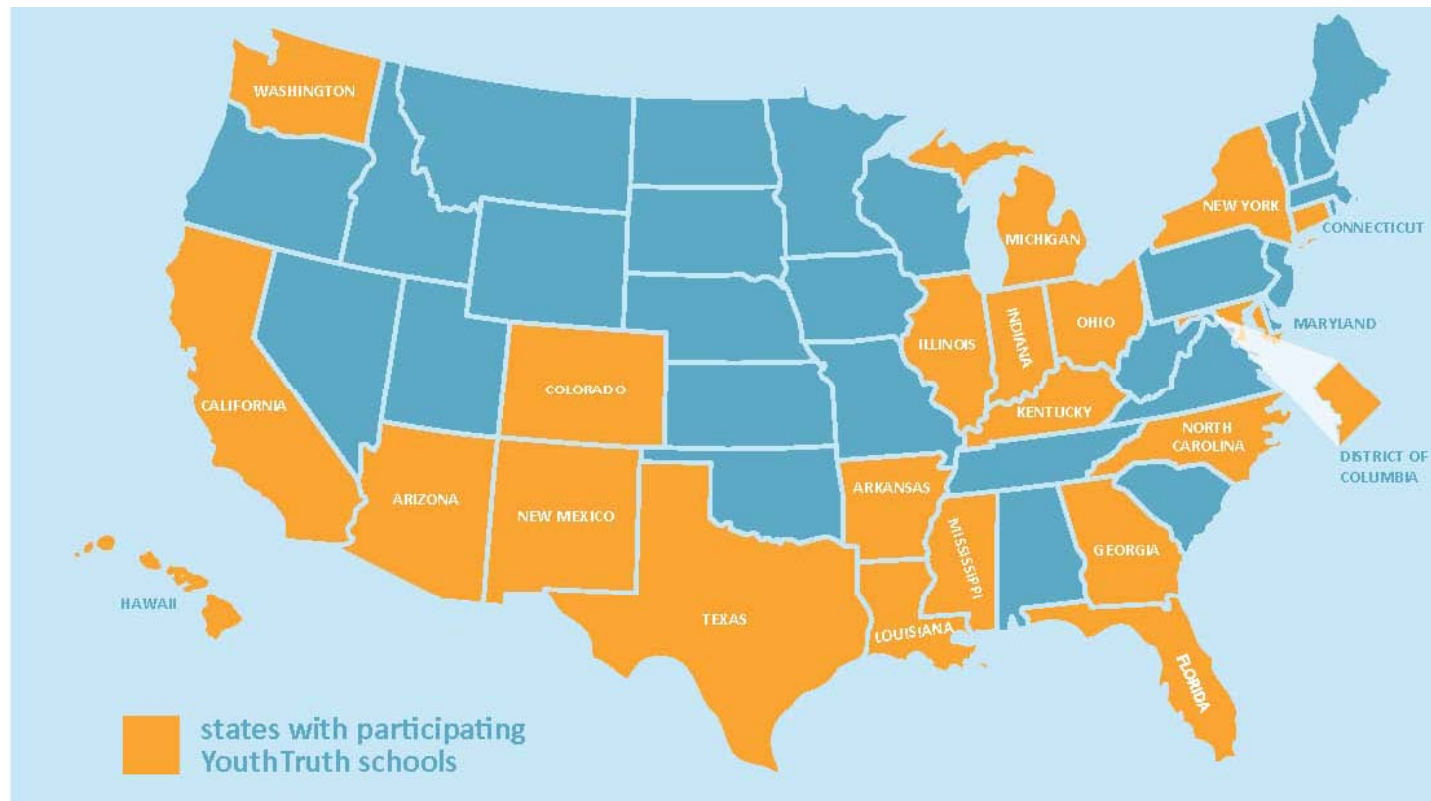


Where We've Been

160,000 students

220+ unique schools

41 districts & networks



YouthTruth Survey Content

School Level

School Culture

Most adults in this school treat students with respect.

Student-Teacher Relationships

How many of your teachers make an effort to understand what your life is like outside of school?

Preparedness for the Future

My school has helped me develop the skills and knowledge I will need to succeed in college-level classes.

Rigor of Classes and Instruction

My teachers connect what I am learning in class to life outside the classroom.

Teacher Level

YouthTruth Rigor and Relationship Questions

The work that I do in this class really makes me think.

Questions from the Measures of Effective Teaching Study*

Our class stays busy and doesn't waste time.

* The Teacher Level Module of the YouthTruth survey contains selected publicly available questions from the Gates Foundation's Measures of Effective Teaching (MET) study.



Key Elements of YouthTruth's Approach

❖ Engage staff and students in multiple ways

- Commit to share results with students
- Comprehensive sharing process with education leaders and funders
- Position education leaders to respond to feedback

❖ Provide detailed comparative data

- Compare schools to others in the same district/network and to national sample
- Compare districts and portfolios of schools
- Compare students' perspectives by teacher

Responding to YouthTruth Data

- ❖ In an independent evaluation, 98% of participants had used data or had plans to use data to make specific changes (2010)
- ❖ 92% of repeat schools said that YouthTruth data had informed changes in their school's decision-making or processes (2011)

Area with Lower Ratings	Schools' Responses
Student-teacher relationships	<ul style="list-style-type: none">• Advisory and mentoring programs• Professional development
School culture	<ul style="list-style-type: none">• Modification of discipline policies• Focus on adult culture issues
Future preparedness	<ul style="list-style-type: none">• Realign college counseling resources
Rigor of classes and instruction	<ul style="list-style-type: none">• Curriculum alignment• New course offerings• Revised grading systems• Staffing decisions

One Funder's Experience: The California Endowment



Building Healthy Communities

- ❖ Supporting 14 communities' efforts to improve employment opportunities, education, housing, neighborhood safety, unhealthy environmental conditions, access to healthy foods and more
- ❖ The goal is to create places where children are healthy, safe and ready to learn

Del Norte: Lack of Economic Opportunity and Educational Success

- ❖ 20% of population living in poverty
- ❖ 32% of children under age 5 are living in poverty
- ❖ High School graduation rate of 70-80%
- ❖ Of High School graduates:
 - 82% are unprepared for College Math or English
 - Less than 20% have completed the minimum required courses to enter a UC or CSU

One Funder's Experience: The California Endowment

What was Needed

- Common understanding of current conditions in education system
- Detail on schools' relative strengths and weaknesses



What We Did

- Surveyed all students attending 4 high schools in Del Norte
- Achieved 80 percent response rate



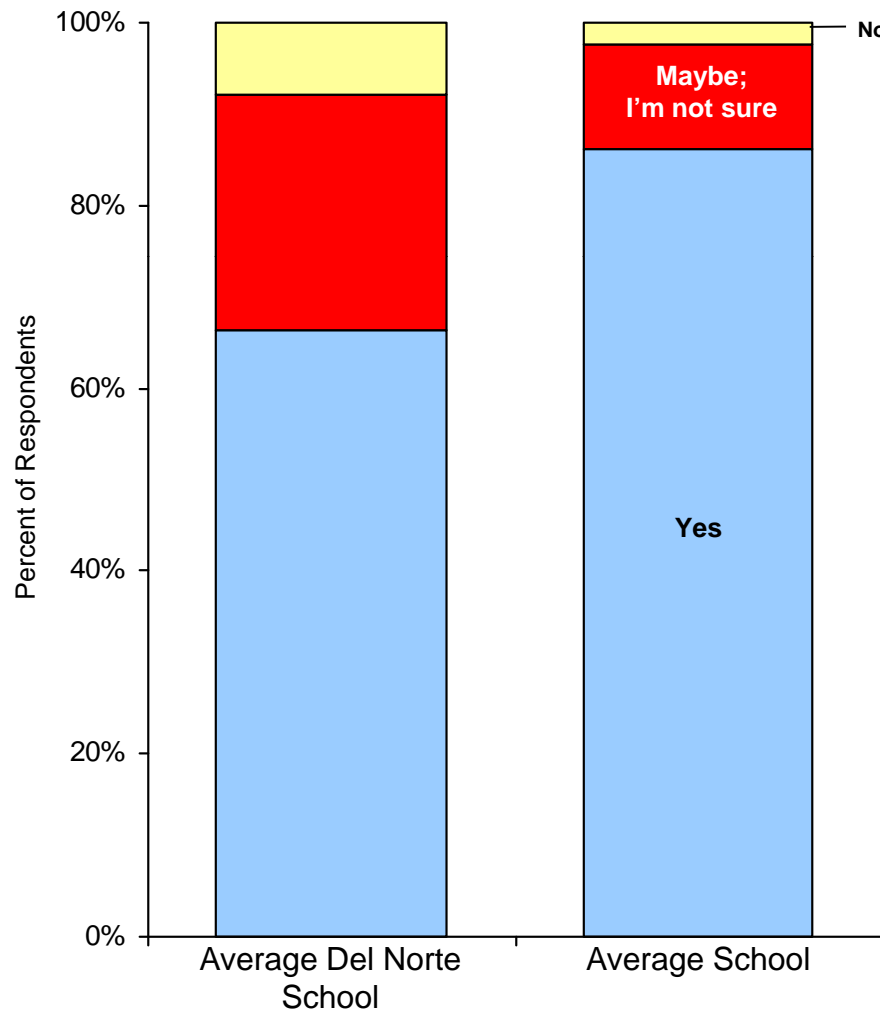
What The Foundation and Community Learned

- Students do not feel challenged in the classroom
- Differential success in building student-teacher relationships across schools
- Students are unsure about their future opportunities after graduation

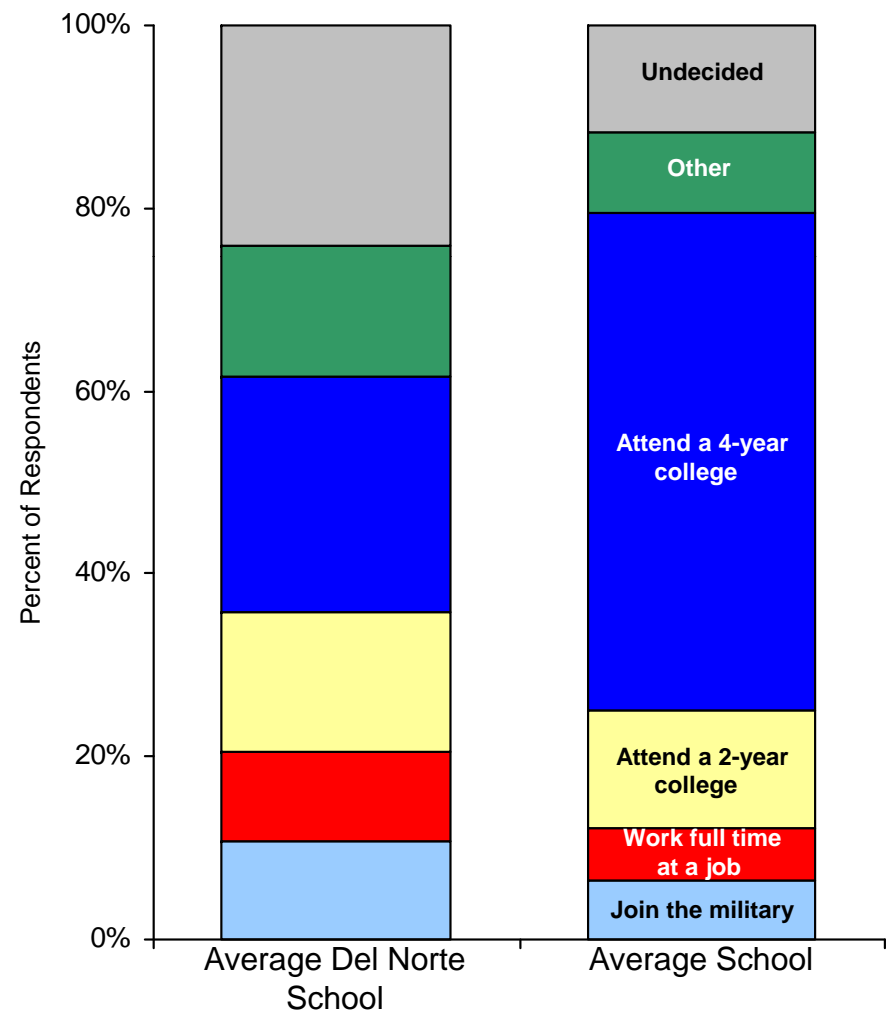
Student Perceptions: Next Steps After High School



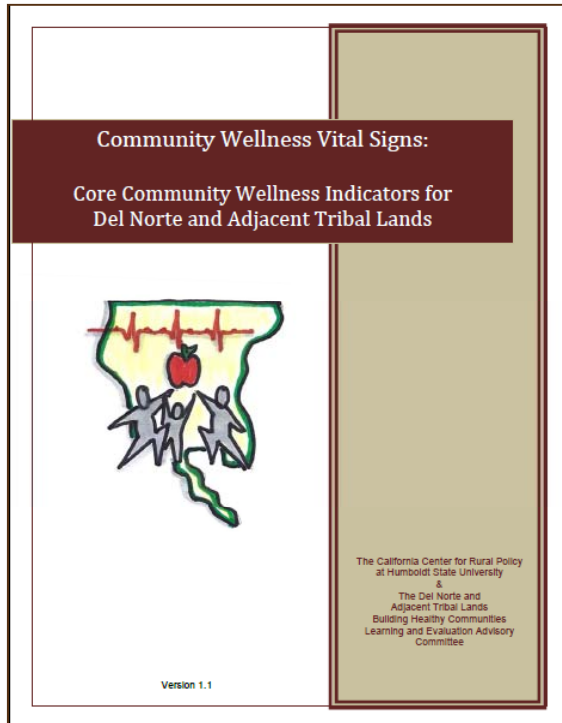
Do you want to go to college?



After you finish high school, what do you expect to do next?



One Funder's Experience: The California Endowment



- ❖ Data helped build community coalition for advancing systemic reform and resulted in strong recommendations to the school district board

- ❖ Superintendent is now endorsing district-wide “systems level change”

- ❖ “Two years ago, it would have been inconceivable to have this kind of change endorsed”

- ❖ YouthTruth data is part of ongoing wellness indicators tracked in Del Norte



A Case Study on Beneficiary Feedback



Hogg Foundation
for Mental Health

ADVANCING RECOVERY AND WELLNESS IN TEXAS



Hogg Foundation
for Mental Health

Hogg Foundation History



James Stephen Hogg



Sarah "Sallie" Stinson

- ❖ James Hogg married Sallie Stinson in 1874.
- ❖ James and Sallie had four children:
 - 1875: William
 - 1882: Ima
 - 1885: Mike
 - 1887: Tom
- ❖ 1891-95: James was Texas governor.
- ❖ In 1895, Sallie was diagnosed with tuberculosis and died shortly after.



History (cont.)



Varner Plantation



West Columbia Oilfield

Source of Family's Wealth

- ❖ **1902: James Hogg purchased Varner Plantation, more than 4,000 acres in West Columbia, Texas.**
- ❖ **1906: James died and left the land to his children, who couldn't sell it for at least 15 years after he died.**
- ❖ **1918: Family struck oil on the land that led to their wealth.**
- ❖ **Field produced over 100,000 barrels a year – the largest Texas gusher ever at the time – and revenues of \$3 million a year.**



History (cont.)

Will Hogg Endowment

- ❖ Will died in 1930 and left a \$3 million estate.
- ❖ \$2.5 million was disbursed to siblings Ima and Mike, who used the funds to create the foundation at the University of Texas.
- ❖ Primary endowment funds grant initiatives and activities statewide.



William Clifford Hogg
1875 - 1930



Hogg Foundation
for Mental Health

History (cont.)

Ima Hogg Endowment

- ❖ Ima Hogg created a second endowment that was activated upon her death in 1975.
- ❖ The endowment may only be used to fund mental health services for children, youth and their families in Houston and Harris County.



Miss Ima Hogg

Mission



Hogg Foundation
for Mental Health

**The Hogg Foundation for Mental Health
advances mental wellness for the people of Texas
as an impactful grantmaker and catalyst for change.**

Vision



Hogg Foundation
for Mental Health

**The Hogg Foundation for Mental Health
will invest our knowledge and resources
to move Texas forward in achieving mental wellness.**



Hogg Foundation
for Mental Health

ADVANCING RECOVERY AND WELLNESS IN TEXAS

Beneficiary Voice



Hogg Foundation
for Mental Health

Beneficiary Voice within the Foundation

- ❖ In 2008 Hogg Foundation for Mental Health hired two program officers who are consumers of mental health services and also appointed two consumer advocates to our National Advisory Council:
 - Represent the voice of beneficiaries in the foundation's strategic planning, grant making, programs and policy activities.
 - Engage beneficiaries and family members in the work of the foundation and other mental health organizations.
 - Bring attention to mental health Recovery in Texas.



Program Operations

- ❖ **Unanticipated benefits** - relationships with grantees; engaging; modeling for other foundations
- ❖ **Challenges** – time spent with grantees; stuck on traditional mindset; “we’ve always done it this way”
- ❖ **Lessons Learned** – a new awareness of the opportunity for ongoing dialogue & training; highlight the skills and knowledge respect the lived experience

East Texas Coalition for Mental Health Recovery



Hogg Foundation
for Mental Health

- ❖ **East Texas Coalition for Mental Health Recovery**
 - **Covers 70 counties with 11 local mental health authorities and 1 State Hospital**
 - **Peer support and opportunities for education, leadership and advocacy**
 - **\$713,143 in second-year funding for this initiative alone**
 - **This past month, trained 21 members of the coalition to be WRAP facilitators**

Via Hope



Hogg Foundation
for Mental Health

❖ Via Hope

- Collaborative of NAMI Texas and Mental Health America of Texas, with funding from the Texas Department of State Health Services and Hogg Foundation for Mental Health
- Peer specialist training/certification program has certified over 175 individuals
- Current employees at mental health service provider agencies and centers; their services are reimbursable



Small Group Discussions

- ❖ How could you see incorporating beneficiary feedback into your own work?
- ❖ Are there aspects of the two approaches described today that you could apply at your foundation?



For Additional Information

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