



**M.J. Murdock**  
Charitable Trust



THE CENTER FOR  
**EFFECTIVE PHILANTHROPY**

## **Center for Effective Philanthropy M. J. Murdock Charitable Trust Assessment Results By Applicants and Grantees**

In the fall of 2011 the Trust engaged the Center for Effective Philanthropy (CEP) to conduct a third-party survey of grantees (Grantee Perception Survey) and applicants who were denied funding (Applicant Perception Survey). This was the most comprehensive assessment of the constituents of the Trust's grants program in its history. We recently received the results, and the Trust's staff has been carefully reviewing and learning from the findings and feedback. We thought you might be interested to know how the Trust compares to CEP's dataset of 273 foundations and over 40,000 individual grantees. Here are a few highlights:

- An amazing response. The response rate for grantees was an astonishing 78 percent, and the rate for declined applicants was 69 percent. Both were well above CEP's national average.
- Trust grants awarded were more than double the size of other funders. The median grant size was \$155,000, as compared to \$60,000 from the full CEP dataset.
- Forty-two percent of Trust grants went to first-time grantees (compared to 31 percent in the dataset).
- The impact of a Trust grant on grantee organizations is notable. The Trust is rated in the **top 6 percent** of all funders, higher than all other peer funders in this particular cohort of foundations.
- The effect of a Trust grant on an organization's ability to achieve its organizational goals is in the **top 3 percent** above all funders.
- Respondents report that success with the Trust provides valuable leverage in pursuing other funding. Grantees report that, based upon the Trust's review and thorough process, they are more likely able to secure funding from other sources. The Trust rates in the **top 2 percent** of other funders.
- Although difficult and time consuming, grantees indicate the application and evaluation process strengthens their organizations and programs. So much so that the Trust rates in the **top 5 percent** of funders in the "selection" process. "It helps us ask the strategic questions," respondents observed.
- Grantees and declined applicants alike note they would prefer less time between submission and a decision. This is an area the Trust has been working on and will continue to address. Our goal is 6 to 7 months once the applicant submits an application. This is approximately eight weeks faster than the historical average.
- Considerable time and effort is spent by applicants on an application proposal. Grantees report spending **twice as much time** preparing a Trust proposal than one for most other funders. Interestingly, declined applicants suggest they spend three times the administrative hours. In recent years the Trust has shortened the response time on Letters of Inquiry and has attempted to enhance the application and related support material to aid applicants. More can and will be done. We welcome your input and value the feedback from the survey. We are implementing additional new steps and better processes and communication.
- Grantees expressed some inconsistencies in communication response time from Trust staff.

- Grantees encouraged the Trust to do more to acknowledge and celebrate the positive reports by organizations and a given project's success. Recent "grants highlights" in the [2011 Annual Report](#) are examples of our doing this.
- Feedback affirmed the Trust's commitment to supporting the mission of organizations and not imposing or excluding those with a focused mission. "Some foundations want us to change our mission and values," respondents reported. "We appreciate that Murdock is focused on helping our organization succeed and thrive."
- Feedback was positive that the Trust encouraged organizations to pursue best practices in the non-profit world and the organization's sector.
- Feedback affirmed the Trust's emphasis on leadership development, board development, and capacity building. "The Trust understands the complexity of leading in our world today."
- Survey participants strongly affirm the grant organizations' clearly identified priorities and assessment of "success" rather than simply the foundation's desired "outcomes" (see [M.J. Murdock Charitable Trust Assessment Philosophy](#)).
- Respondents appreciate the improved, web-based information but desire more web-based application/resources/support. "A clear step-by-step for smaller organizations would be helpful," reported respondents. See [Before You Start](#), a document outlining the grant process. Respondents said, "Help us understand the Trust's expectations of a grant application" (see [Writing Great Grants](#)).

In summary, the Trust values learning and continually seeks opportunities to grow and improve. Each year Trust staff host roundtables on various topics that inform our activities. Practitioners from across the country provide us with counsel that shapes current and future granting programs and more generally informs us of emerging trends. Many of the Trust's focused programs in science, special initiative grants, and enrichment activities are the direct result of these conversations. Each year program directors attend sector-specific conferences to learn from those in the field and other professional development opportunities related to best practices in grantmaking. Furthermore, we regularly meet with prospective applicants who are constantly pursuing new and innovative ways to achieve their missions. And on a regular basis the Trust engages in various kinds of research to assess its activities. Previous examples include qualitative research of grantees, conducted by Senior Fellow Jay Barber in 2009, that helped the Trust's leadership better understand how past applicants perceived the Trust's communication and processes.

In the next several months the staff will be busy considering how to capitalize on the data generated and the suggestions made. As we proceed with specific steps taken as a result of this learning opportunity, you will see changes in the website and improvements in our processes and other communications. If you were one of those who participated in either survey, we thank you for your honest and helpful feedback. If you were not among those asked to participate, please feel free to offer your feedback directly to the Trust at any time. We like hearing from you. Send us a comment through our [website](#).



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