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William and Flora Hewlett Foundation's Organizational Effectiveness Evaluation

December 2022

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Foreword

Creative Research Solutions (CRS) served as the evaluation partner for the William and Flora Hewlett Foundation's Organizational Effectiveness (OE) Evaluation.

Founded in 2009, Creative Research Solutions, LLC, is an award-winning research and evaluation firm located in the Atlanta metropolitan area. Through culturally responsive evaluation and authentically engaged and rigorous data collection and analysis, we help clients critically evaluate their work to support and refine their approaches. When evaluating outcomes and impacts, we ensure that our approach, refined and sharpened over time, is aligned with local values, while being directly coordinated with initiative and portfolio-level design and data collection activities. This approach enables us to generate strengths-based evaluation findings, demonstrate impacts, and provide actionable suggestions for addressing gaps and future growth.

This evaluation and report were led and prepared by the CRS evaluation team, including Dr. Molly Matthews-Ewald, Amanda Tyler, Dr. Chiara Sumich, Katharina Grimm, Dr. Nivedita Ranade, Dr. Osa Maiyenne Adaján, and Melissa Shea-Brooks. The CRS evaluation team had final oversight and input on the reporting and interpretation of the findings. We incorporated feedback and insights from the Hewlett Foundation staff, where possible, throughout the process — especially during the Sensemaking Session, which allowed the CRS team to contextualize the findings.

We would like to acknowledge and thank our partners within the Hewlett Foundation who provided invaluable insight, guidance, and support throughout the evaluation process: Jennifer Wei, Dr. Amy Arbreton, Kathleen Badejo, and Morgan Reams, who supported the evaluation as a program associate before transitioning into another role. We would also like to express our appreciation to the current and prior Hewlett staff who provided valuable insights to help guide the development of this report by participating in the Sensemaking Session: Jasmine Sudarkasa, Marselle Alexander-Ozinskas, Lori Grange, Jehan Velji, and Leeanne Oue.

Finally, and most importantly, we would also like to express our appreciation for the foundation program staff, grantees, and consultants who shared valuable insights, experiences, and honest opinions with us through participating in surveys, interviews, and focus groups.

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Executive Summary

For over 50 years, the William and Flora Hewlett Foundation, a private, nonpartisan foundation, has supported a number of efforts, including performing arts, education for all, preserving the environment, fostering gender equity and governance around the world, advancing ideas, and the philanthropic sector. Focused on supporting institutions to promote a better world, the foundation makes grants to diverse organizations, including grassroots organizations and research universities.¹ Its Effective Philanthropy Group (EPG) seeks to strengthen the capacity of Hewlett Foundation grantees — and philanthropy, in general — to achieve their goals and benefit the common good.

The Organizational Effectiveness Program

Established at the William and Flora Hewlett Foundation in 2004 (and housed within the Effective Philanthropy Group),² the Organizational Effectiveness (OE) program provides critical and targeted support to Hewlett Foundation grantees with the aim of strengthening “their internal systems, enabling [grantees] to do their work better and enhance their impact.”³ The goal of the OE program is to “**help nonprofits become high-performing organizations that are healthy, sustainable, and successful in achieving their goals.**” To support this, the OE program, which consists of 1.5 full-time equivalent OE staff and a budget of \$8.6 million in grantmaking (in 2022), focuses on three areas: (1) providing guidance and resources to the foundation program staff; (2) sharing and exchanging ideas and lessons learned with the broader philanthropic field; and (3) awarding OE grants to existing foundation grantees in areas such as:

- Strategic planning.
- Leadership transitions.
- Board development and governance.
- Communications planning.
- Diversity, equity, and inclusion.
- Financial planning.⁴

Central to the foundation’s philanthropic approach is the outcome-focused philanthropy (OFP) framework that fosters the continuous learning, evaluation, and adaptation of the foundation’s strategies to ensure meaningful progress toward the goal of each program strategy, including OE.

¹ “About Us,” William and Flora Hewlett Foundation, 2022, <https://hewlett.org/about-us/>.

² “Organizational Effectiveness Program,” William and Flora Hewlett Foundation, 2018, <https://www.hewlett.org/wp-content/uploads/2018/06/Organizational-Effectiveness-Program.pdf>.

³ “Organizational Effectiveness,” William and Flora Hewlett Foundation, 2022, <https://hewlett.org/strategy/organizational-effectiveness/>.

⁴ “Organizational Effectiveness Program,” William and Flora Hewlett Foundation, 2018, <https://www.hewlett.org/wp-content/uploads/2018/06/Organizational-Effectiveness-Program.pdf>.

OE Program's Strategy Refresh



The last evaluation of the OE strategy occurred in 2015. Toward the end of 2020, the EPG launched a refresh of its OE program. Briefly, the foundation notes that a strategy refresh (see **Figure to the left**) is a “methodological review that focuses on whether (and how) to make significant course corrections.” More

specifically, the purpose of this evaluation was not to determine the impact of the OE program, but rather to inform the OE program's strategy refresh. To that end, the overarching questions included:

1. **PROGRAM STAFF CAPACITY BUILDING:** How and to what extent is the support from the OE team helping achieve their intended outcomes for program staff and grantees? Besides short-term project grants, what are other effective ways being offered by program teams to support grantees in building capacity?
2. **GRANTEE SELECTION:** How are grantees selected by program officers to receive OE support? How do program officers select grantees to receive OE support critical to each program's strategy? How is the OE program building the capacity of the selected grantees, in terms of strategic importance, equity considerations, and/or other measures?
3. **GRANTEE CAPACITY BUILDING:** How and to what extent are grantees identifying their capacity needs and requesting support for their most important needs? Why are these needs identified as most important?
4. **ORGANIZATIONAL EFFECTIVENESS GRANT OUTCOMES:** How and to what extent did grantees benefit from the Organizational Effectiveness program? What did the OE grants allow the grantees to do that they would otherwise not be able to accomplish?

In addition, beginning in 2020, the foundation initiated a one-time, ~\$750,000 **COVID-19 Emergency Financial Technical Assistance (TA) program** that matched about 110 grantees with financial advisors and accountants, external to the Hewlett Foundation, to provide “confidential financial advice and support for grantees as they consider the fiscal impacts of the COVID-19 crisis on their organizations.”⁵ Because of the unique opportunity to learn from this new model, this evaluation also explored the COVID-19 Emergency Financial TA program to glean learnings for a different approach to enhancing capacity-building support for grantees in the future.

Overall Findings

Overall, respondents across the board (foundation program staff and OE grantees) were pleased with the OE program and felt that it ultimately was helpful to support grantees in their endeavors to build organizational capacity. In addition, the one-time Financial TA program provided some positive impacts to the participating grantees, although these positive impacts tended to vary more than the grantees' experiences with the OE program. More specific findings are provided below.

⁵ “Hewlett Foundation COVID-19 Emergency Financial Technical Assistance Program: Overview for Grantees,” William and Flora Hewlett Foundation, (n.d.).



Foundation Program Staff Capacity Building

Foundation program staff noted that the OE team helps them strengthen their own capacity,⁶ so that they can better support their grantees. Some identified areas that the OE team was particularly helpful were (1) providing advice and assistance around prioritizing and supporting grantees' capacity needs, (2) providing tools to help with grantee capacity building, and (3) aiding program staff with grantee/consultant matching. Additional supports that program staff felt might be helpful included (1) sharing learnings across the organization, (2) increasing support for the OE team to be able to provide even more resources, and (3) additional OE funding.

What is capacity building?

“Capacity building is the process of building and strengthening the systems, structures, cultures, skills, resources, and power that organizations need to serve their communities.”⁶



Grantee Selection

The foundation program staff reported that grantees largely approached them about applying for an OE grant based on grantee-identified capacity-building needs, but that program staff would also directly approach grantees to apply for an OE grant or bring up the option to apply for an OE grant to grantees they believed would be a good fit. Staff also noted that when selecting which grantees to receive support, they consider which organizations may most benefit from receiving an OE grant and prioritize equitable grantmaking processes for selecting grantees.

Interestingly, when examining a subset of those grantees that received a high number of OE grants (i.e., high-frequency OE grantees⁷) compared to those that had not (i.e., non-high-frequency OE grantees), a higher proportion of high-frequency OE grantees reported requesting capacity-building support from their program officer than the non-high-frequency grantees. Compared to those white-identifying grantee respondents, BIPOC-identifying respondents less often selected that they or their organization directly requested capacity-building support from their program officer. Similarly, BIPOC-identifying grantee respondents less often indicated that their organization had previously received an OE grant and requested another OE grant, compared to white-identifying grantee respondents.



Grantee Capacity Building

Findings indicated that the relationship building that occurs between OE staff, the foundation program staff, and grantees is one of the predominant strengths of the OE program. In particular, the foundation program staff found that through relationship building, grantees are able to be vulnerable about improvement areas in their organization without the fear of losing funding. Grantees

⁶ Grantmakers for Effective Organizations as cited in: Jennifer Wei, “Lessons and Trends in Nonprofit Capacity Strengthening,” Ideas + Practice (blog), April 19, 2022, <https://hewlett.org/lessons-and-trends-in-nonprofit-capacity-strengthening/>.

⁷ Because a separate data file was used to determine the grantee survey respondents' high-frequency OE grantee status, this is a subset (N = 105) of the total number of grantees who responded to the grantee survey (N = 241). The subset was compiled out of all grantee survey respondents who received an OE grant since 2004, and who were able to be matched by organization name to respondents from the OE grantee survey. “High-frequency OE grantees” had received, on average, 0.4 grants per year they were in contact with the Hewlett Foundation. This ratio was determined by dividing the number of grants received by the number of years an organization has been in contact with the foundation. 0.4 was chosen as the threshold to classify a grantee as a high-frequency OE recipient because the top fourth (or highest 25%) of the subset all had a ratio of 0.4 or higher.

are able to have meaningful conversations with OE staff and foundation program staff around prioritizing their needs — ensuring that their project design is achievable and the grant amount fits the grantee’s current and most urgent needs. Relatedly, grantees are largely identifying their own capacity-building needs. Grantees shared that the OE program is an important source of funding for their organizations; to the extent that about half of the surveyed organizations would have either delayed or not invested in capacity-building work. This is even more true for organizations with smaller annual budgets. Importantly, the OE program is either fully or partially meeting the needs of grantees. When the OE program did not fully meet their organization’s needs, the cited reasons included that the project scope was too large or the funding amount did not cover the full cost of the work, indicating that the current OE funding may not adequately cover both the direct and indirect costs of grantee projects.



Organizational Effectiveness Grant Outcomes

Perhaps not surprisingly, grantee capacity building was one of the main benefits of the OE program, particularly that the OE program:

- Improved the ability to progress toward grantees’ overall mission and strategic goals.
- Helped improve their organizational health.
- Helped build organizational capacity.

Further, the grantees shared that without the OE grants, their institutional priorities would fall behind other priorities. Relatedly, grantees appreciated the dedicated time to attend to their organization’s goals and strategies and plan for the upcoming years. Overall, there is a highly positive sentiment regarding the OE program.

While relatively few opportunities for growth and/or challenges were provided, several respondents indicated additional funding and more promotion of the OE program to grantees would be helpful. However, it should be noted that the different foundation programs may advertise or promote the OE program differently and in different ways. Thus, this finding may be more applicable to certain program areas than others. Some notable challenges shared by respondents included different definitions of what diversity, equity, and inclusion (DEI) mean for U.S.-based grantees compared to international grantees. For example, foundation program staff noted that determining what advancing DEI means for organizations in the Global South and African organizations may be different from U.S.-based grantees.



COVID-19 Emergency Financial Technical Assistance Program Learnings

As noted, this evaluation also examined the one-time COVID-19 Emergency Financial TA program to glean learnings for a different approach to enhancing capacity-building support for grantees in the future. Findings indicated that while the foundation’s programs used different methods to determine need, program staff tended to focus on recommending grantees disproportionately affected by the COVID-19 pandemic. Once received, respondents noted that the TA program filled an important need within the organizations; appreciated its flexibility, such that the program could be tailored to the grantee organization’s needs; and that offering the program demonstrated the foundation’s commitment to its grantees.

In general, grantees noted that they worked well with the financial TA consultants; however, some felt that improvements — such as incorporating a cohort-based approach, additional time and/or supports from the TA consultants, and more accountability of the TA consultants — may have made their experiences more positive. Some grantees did not have as positive experiences. It is possible that grantees' experiences may be impacted by the specific TA consultant with which they were paired, rather than the program itself.



Added Value of OE Team

Respondents overwhelmingly viewed the support from the OE team as being invaluable. Some notable assets provided by the OE team include but are not limited to, (1) providing the foundation program staff effective support and tools, (2) responsiveness, and (3) providing referrals to other funders and/or other funding opportunities. Importantly, several program staff offered that one of the main strengths of the OE program is the OE staff.

Though some grantees and staff noted that they would like to see additional OE staff, this was in relation to getting additional support for the existing OE staff so they can continue (and even increase) their important role. However, it should be noted that the foundation intentionally employs a lean staffing model, where the organization has relatively few staff compared to other organizations similar in grantmaking size. With about 130 staff across the organization, the lean staffing model is designed to “reinforce other commitments,” including “looking to grantees for ideas and leaving room for them to experiment and explore.”⁸ Thus, alternative means to provide additional support could include such areas as peer learning opportunities within program staff as well as among grantees.

Given the Hewlett Foundation’s commitment to refresh its programs, ensuring that the foundation’s programs are as responsive to grantees’ needs as possible, the findings from this evaluation can offer some learnings. As the OE program moves into its next phase, it is helpful to reflect on potential opportunities for refinement. These findings can offer insights into ways that the OE program and staff can continue its important work supporting organizational health in a **“collaborative, trusting way [to] support organizations on their own journey...[which]...is essential for the development and viability of organizations”** (Organizational Effectiveness Grantee).

⁸ “Autonomy and Cooperation — Lean Staff and Flexible Procedures,” William and Flora Hewlett Foundation, 2022, <https://hewlett.org/autonomy-cooperation-lean-staff-flexible-procedures/>.

Acronyms and Abbreviations

Acronyms and Abbreviations	Meaning
OE	Organizational Effectiveness
CRS	Creative Research Solutions, LLC
DEI	Diversity, Equity, and Inclusion
EPG	Effective Philanthropy Group
GEG	Gender, Equity, and Governance
TA	Technical Assistance

Definitions

Key Term	Definition
Strategy Refresh	A methodological review that focuses on whether (and how) to make significant course corrections. Strategy refreshes typically include the use of an independent third-party evaluator to help staff take a fresh look and apply lessons learned to a revised road map for moving forward.

Introduction to the William and Flora Hewlett Foundation’s Organizational Effectiveness Program Refresh

For over 50 years, the William and Flora Hewlett Foundation, a private, nonpartisan foundation, has supported a number of efforts, including performing arts, education for all, preserving the environment, fostering gender equity and governance around the world, advancing ideas, and the philanthropic sector. Focused on supporting institutions to promote a better world, the foundation makes grants to diverse organizations, including grassroots organizations and research universities.⁹ Its Effective Philanthropy Group (EPG) seeks to strengthen the capacity of Hewlett Foundation grantees — and philanthropy, in general — to achieve their goals and benefit the common good.

The Organizational Effectiveness Program

Established at the William and Flora Hewlett Foundation in 2004 (and housed within the Effective Philanthropy Group),¹⁰ the Organizational Effectiveness (OE) program provides critical and targeted support to Hewlett Foundation grantees with the aim of strengthening “their internal systems, enabling [grantees] to do their work better and enhance their impact.”¹¹ The goal of the OE program is to “**help nonprofits become high-performing organizations that are healthy, sustainable, and successful in achieving their goals.**” To support this, the OE program, which consists of 1.5 full-time equivalent OE staff and a budget of \$8.6 million in grantmaking (in 2022), focuses on three areas: (1) providing guidance and resources to the foundation program staff; (2) sharing and exchanging ideas and lessons learned with the broader philanthropic field; and (3) awarding OE grants to existing foundation grantees in areas such as:

- Strategic planning.
- Leadership transitions.
- Board development and governance.
- Communications planning.
- Diversity, equity, and inclusion.
- Financial planning.¹²

Central to the foundation’s philanthropic approach is the outcome-focused philanthropy (OFP) framework that fosters the continuous learning, evaluation, and adaptation of the foundation’s strategies to ensure meaningful progress toward the goal of each program strategy, including OE.

⁹ “About Us,” William and Flora Hewlett Foundation, 2022, <https://hewlett.org/about-us/>

¹⁰ “Organizational Effectiveness Program,” William and Flora Hewlett Foundation, 2018, <https://www.hewlett.org/wp-content/uploads/2018/06/Organizational-Effectiveness-Program.pdf>

¹¹ “Organizational Effectiveness,” William and Flora Hewlett Foundation, 2022, <https://hewlett.org/strategy/organizational-effectiveness/>

¹² “Organizational Effectiveness Program,” William and Flora Hewlett Foundation, 2018, <https://www.hewlett.org/wp-content/uploads/2018/06/Organizational-Effectiveness-Program.pdf>

Figure 1 | OE Program’s Strategy Refresh



The last evaluation of the OE strategy occurred in 2015. Toward the end of 2020, the EPG launched a refresh of its OE program. Briefly, according to the foundation, a strategy refresh (see **Figure 1**) is a “methodological review that focuses on whether (and how) to make significant course corrections. Strategy refreshes typically include using an

independent third-party evaluator to help staff take a fresh look and apply lessons learned to a revised road map for moving forward.” The refresh typically focuses on four “clusters” of questions: (1) assessing progress to date; (2) scanning for developments in the field and at the foundation; (3) refining the strategy; and (4) contemplating an exit. This evaluation supports clusters 1 and partially 2, to inform clusters 3 and 4.¹³

This current 2021-2022 evaluation is focused on understanding:

- The OE strategy successes.
- The experiences of grantees, the foundation program staff, and consultants.
- What OE has done in the last years since the evaluation in 2015.¹⁴
- How the strategy contributes to supporting and building the capacity of grantees.

The remainder of this report describes the findings from the current 2021-2022 evaluation. We begin with a brief description of the evaluation methods and sample, then lead into a report of the findings, and lastly, offer some conclusions and reflections for consideration.

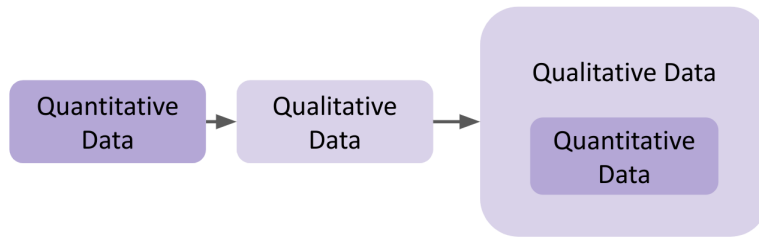
Evaluation Methods and Sample

Data were collected using a mixed-methods evaluation approach. In particular, we engaged in a sequential, embedded mixed-methods evaluation design (see **Figure 2**), where we began with collecting quantitative data and used the information captured to develop and further understand information via qualitative data.

¹³ “A Practical Guide to Outcome-Focused Philanthropy,” William and Flora Hewlett Foundation, November 2016, <http://www.hewlett.org/wp-content/uploads/2017/05/OFP-Guidebook-updated.pdf>.

¹⁴ Foundation program staff have eight-year term limits; thus, staff participating in this current evaluation will likely not have participated in the 2015 evaluation.

Figure 2 | Mixed-Methods Evaluation Design



Participants and Data Sources

We also identified multiple data sources (both qualitative and quantitative) to triangulate information from multiple informants and collaborators (see **Figure 3**).

Figure 3 | Data Sources

Respondent Type ¹⁵	Data Type	Participants	Response Rates*	Dates Completed
Hewlett Foundation Program Staff	Survey (Quantitative) ¹⁶	24 foundation program staff	50.0%	Nov 2021
	Interviews (Qualitative)	13 foundation program staff (including 2 OE staff)	100.0%	Jan/Feb 2022
Organizational Effectiveness Grantees	Survey (Quantitative) ¹⁷	241 grantees that received an OE grant between 2018 and 2020	59.4%	Dec 2021
	Interviews (Qualitative)	5 (including 3 grantees that received COVID-19 Financial TA)	55.6%	April/May 2022
	Focus Groups (Qualitative)	14 (two groups of 7 grantees each)	51.9%	April 2022
Consultants	Interviews (Qualitative)	6 (including 5 external TA consultants and 1 internal communications consultant)	75.0%	April 2022
Select Hewlett Foundation Staff	Sensemaking Session (Qualitative)	7 current and former Hewlett Foundation staff	N/A	June 2022
Document Review	Hewlett Foundation Documents (Qualitative)	55 documents	N/A	May 2021

*A recent meta-analysis of 1,071 online surveys in education-related research reported an average online response rate of 44.1% for online surveys.¹⁸

¹⁵ OE grantees and consultants received remuneration as a thank you for participating in data collection activities. Program staff were not compensated for their time.

¹⁶ The foundation program staff survey was piloted with two program officers in September 2021. These responses are included in the findings, as the survey was minimally updated based on the pilot.

¹⁷ The grantee survey was piloted with three grantees in November 2021. These responses are included in the findings, as the survey was minimally updated based on the pilot.

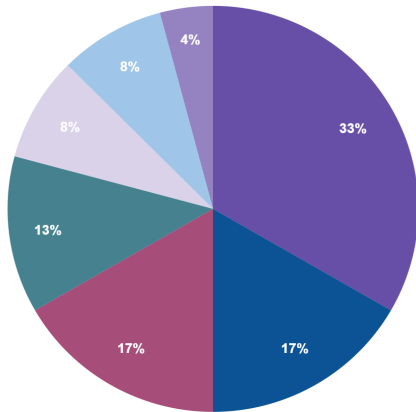
¹⁸ Meng-Jia Wu, Kelly Zhao, and Francisca Fils-Aime, "Response Rates of Online Surveys in Published Research: A Meta-Analysis," *Computers in Human Behavior Reports*, vol. 7 (2022).

Figures 4 and 5 provide an overview of the demographic characteristics of all program staff and grantee survey participants, respectively. Of the 24 foundation staff who responded to the survey, more than half represented the Gender, Equity, and Governance (GEG), Environment, or Performing Arts programs; slightly more than half held the title of program officer; most had been at the foundation for five years or less; half identified as white only; and most identified as female/woman.

Figure 4 | Foundation Staff Survey Respondent Demographics¹⁹

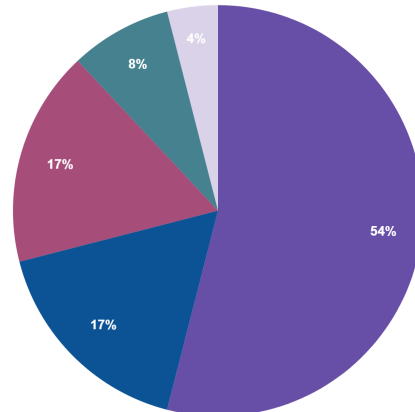
Foundation Program Staff Survey Respondents by Program Area

- Gender Equity and Governance
- Environment
- Performing Arts
- Education
- Initiatives - Cyber
- Effective Philanthropy
- U.S. Democracy



Foundation Program Staff Survey Respondents by Role

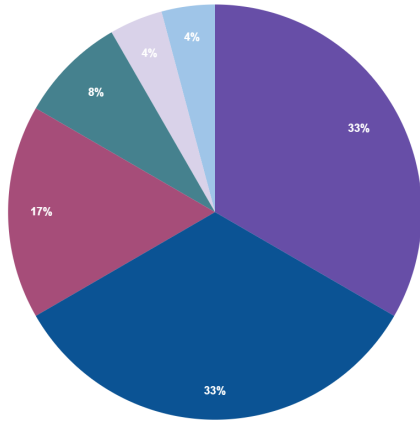
- Program Officer
- Program Director
- Program Associate
- Fellow
- Other



¹⁹ We were unable to compare the foundation program staff survey respondents to all foundation program staff. Thus, this information describes who responded to the program staff survey, rather than an understanding of the representativeness of the respondents.

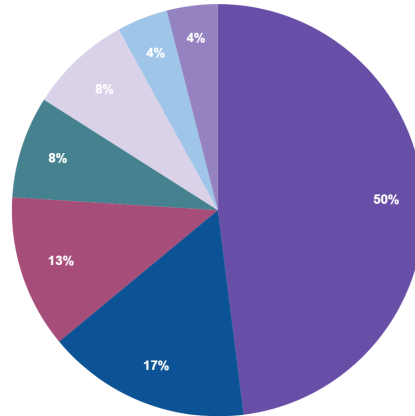
Foundation Program Staff Survey Respondents by Number of Years at the Hewlett Foundation

- 2 < 3 years
- 6 to 10 years
- 3 to 5 years
- Less than 2 years
- 5 < 6 years
- More than 10 years



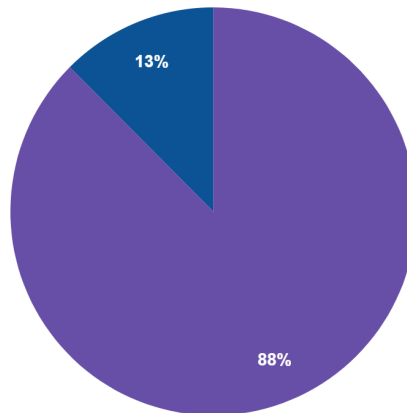
Foundation Program Staff Survey Respondents by Race/Ethnicity

- White
- Asian or Asian American
- Black or African American
- Hispanic or Latino/a/x
- Prefer not to say
- American Indian, Native American, or Indigenous
- Multiracial or Multiethnic



Foundation Program Staff Survey Respondents by Gender

- Female/Woman
- Male/Man



Of the 241 grantee respondents, the Performing Arts Program represented the most frequently reported program area for respondents' most recent OE grant (followed closely by GEG and Environment). Almost one-fourth reported an annual budget of \$1 to 2.5 million, over half described their role as executive director/CEO or other senior management, nearly 25% had a staff size between 21 to 50 full-time employees, almost half had been with their organization for less than five years, over two-thirds identified as white only, over two-thirds of OE grantee survey respondents identified as female/woman,

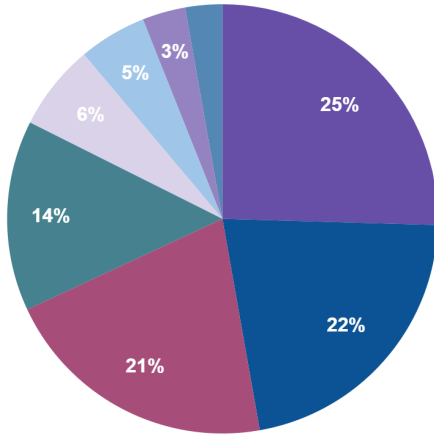
and slightly less than half all grantee survey respondents ($n = 47$) who received an OE grant since 2004 were categorized as high-frequency OE grantees.²⁰

²⁰ Because a separate data file was used to determine the grantee survey respondents' high-frequency OE grantee status, this is a subset ($N = 105$) of the total number of grantees who responded to the grantee survey ($N = 241$). The subset was compiled out of all grantee survey respondents who received an OE grant since 2004, and who were able to be matched by organization name to respondents from the OE grantee survey. "High-frequency OE grantees" had received, on average, 0.4 grants per year they were in contact with the Hewlett Foundation. This ratio was determined by dividing the number of grants received by the number of years an organization has been in contact with the foundation. 0.4 was chosen as the threshold to classify a grantee as a high-frequency OE recipient because the top fourth (or highest 25%) of the subset all had a ratio of 0.4 or higher.

Figure 5 | Organizational Effectiveness Grantee Survey Respondent Demographics

OE Grantee Survey Respondents by Most Recent OE Grant

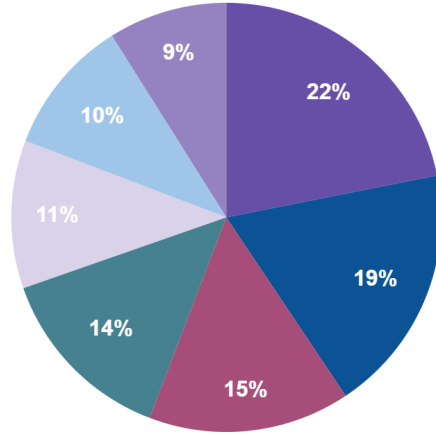
- Performing Arts
- Environment
- Effective Philanthropy
- Gender Equity and Governance
- Education
- Initiatives - Cyber
- U.S. Democracy
- Other



Note: "Other" represents about 3% of the total responses.

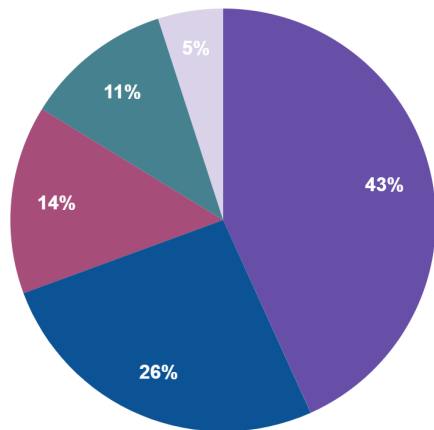
OE Grantee Survey Respondents by Organization Annual Budget

- \$1,000,001 to \$2,500,000
- \$5,000,001 to \$10,000,000
- Greater than \$20,000,000
- \$2,500,001 to \$5,000,000
- \$501,000 to \$1,000,000
- \$10,001,000 to \$20,000,000
- Less than \$500,000



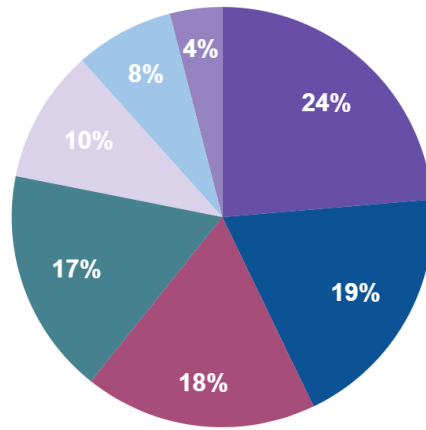
OE Grantee Survey Respondents by Role within their Organization

- Executive Director/CEO
- Development Director
- Program/Project Director
- Other Senior Management
- Other Development Staff



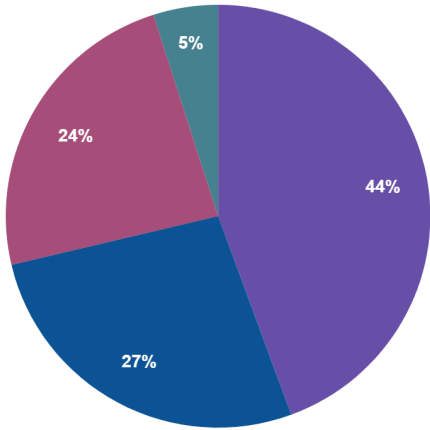
OE Grantee Survey Respondents by their Organization Staff Size

- 21-50 staff
- Fewer than 5 staff
- 101-500 staff
- 6-10 staff
- 11-20 staff
- Greater than 500 staff



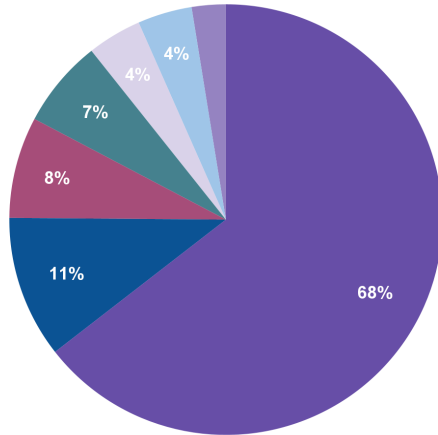
OE Grantee Survey Respondents by Number of Years Grantee Respondent has Been with their Organization

- 1-5 years
- More than 10 years
- 6-10 years
- Less than 1 year



OE Grantee Survey Respondents by Respondent-Reported Race/Ethnicity

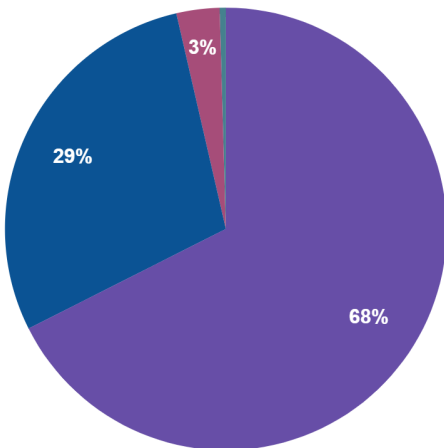
- White
- Asian or Asian American
- Hispanic or Latino/a/x
- Black or African American
- Prefer to self-describe
- Prefer not to say
- Native American, American Indian, or Indigenous



Note: Only collected for U.S.-based grantee respondents. All respondents who preferred to self-describe identified with two or more races/ethnicities; “Native American, American Indian, or Indigenous” represents about 3% of the total responses.

OE Grantee Survey Respondents by Gender Identity

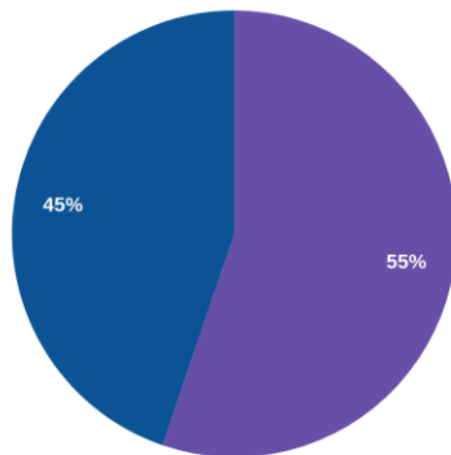
- Female/Woman
- Male/Man
- Prefer not to say
- Nonbinary



Note: “Nonbinary” represents about 0.5% of the total responses.

OE Grantee Survey Respondents by High-Frequency OE Grantee Status

- No
- Yes



Limitations of the Current Evaluation

While there are many strengths of this evaluation, including the diversity of the respondents; the pilot testing of the surveys to ensure the understandability of questions; and the utilization of qualitative and quantitative, primary, and secondary data to triangulate and corroborate findings, this is not without some limitations. First, we were unable to disaggregate by additional characteristics (e.g., specific race/ethnicity, although we did disaggregate by BIPOC/white) due to the limited sample size in some subpopulations.

Second, although efforts were made to recruit grantees who had participated in the COVID-19 Emergency Financial TA program to solicit their feedback, those who responded represent a relatively small proportion of those grantees that received this support. Some potential reasons for this include that the foundation's programs may have referred to this program differently, using different terminology, which may have resulted in grantees not knowing that they had participated.

Third, while we made efforts to recruit all grantees who received an OE grant between 2018 and 2020, there was some potential selection bias for several reasons. For example, the nonprofit sector has experienced an increase in staff turnover²¹, and grantees with newer staff may feel less qualified to respond to our requests for participation.

Despite these noted limitations, rich and detailed information was shared, allowing for a holistic understanding of the state of the Hewlett Foundation's OE program.

²¹ Amy West, "Employee Turnover Is Impacting Not-for-Profits Too," *The CPA Journal* (March/April 2022), <https://www.cpajournal.com/2022/05/18/employee-turnover-is-impacting-not-for-profits-too/>.

Findings

The next several sections are presented by the overarching themes that were identified across multiple respondent types (i.e., Hewlett Foundation program staff, OE grantees, consultants), noting differences in opinions (or silence) where applicable. De-identified quotes are provided, as appropriate, to further explicate the underlying theme. In some cases, quotes are minimally modified with bracketed text to improve understanding. Please note that for the quantitative surveys, multiple response options were included. When percentages are provided in the text, the corresponding anchor is reported (e.g., **strongly agree, somewhat agree**); not all percentages are included in the body of this report, see **Appendices A and B** for additional frequencies and percentages. Finally, for clarity, the bar charts do not present the 0s in cases where no respondents selected a particular response.

Hewlett Foundation Program Staff Capacity Building

The Hewlett Foundation OE team (comprising one full-time OE officer and a 0.5 time program associate) is responsible for providing guidance and resources to the foundation program staff so they are better able to guide grantees working to successfully achieve their goals. In this section, we discuss how the support from the OE team is helping the foundation program staff and grantees achieve their intended outcomes, what activities have been most helpful, and what additional supports may be needed for future grantmaking.

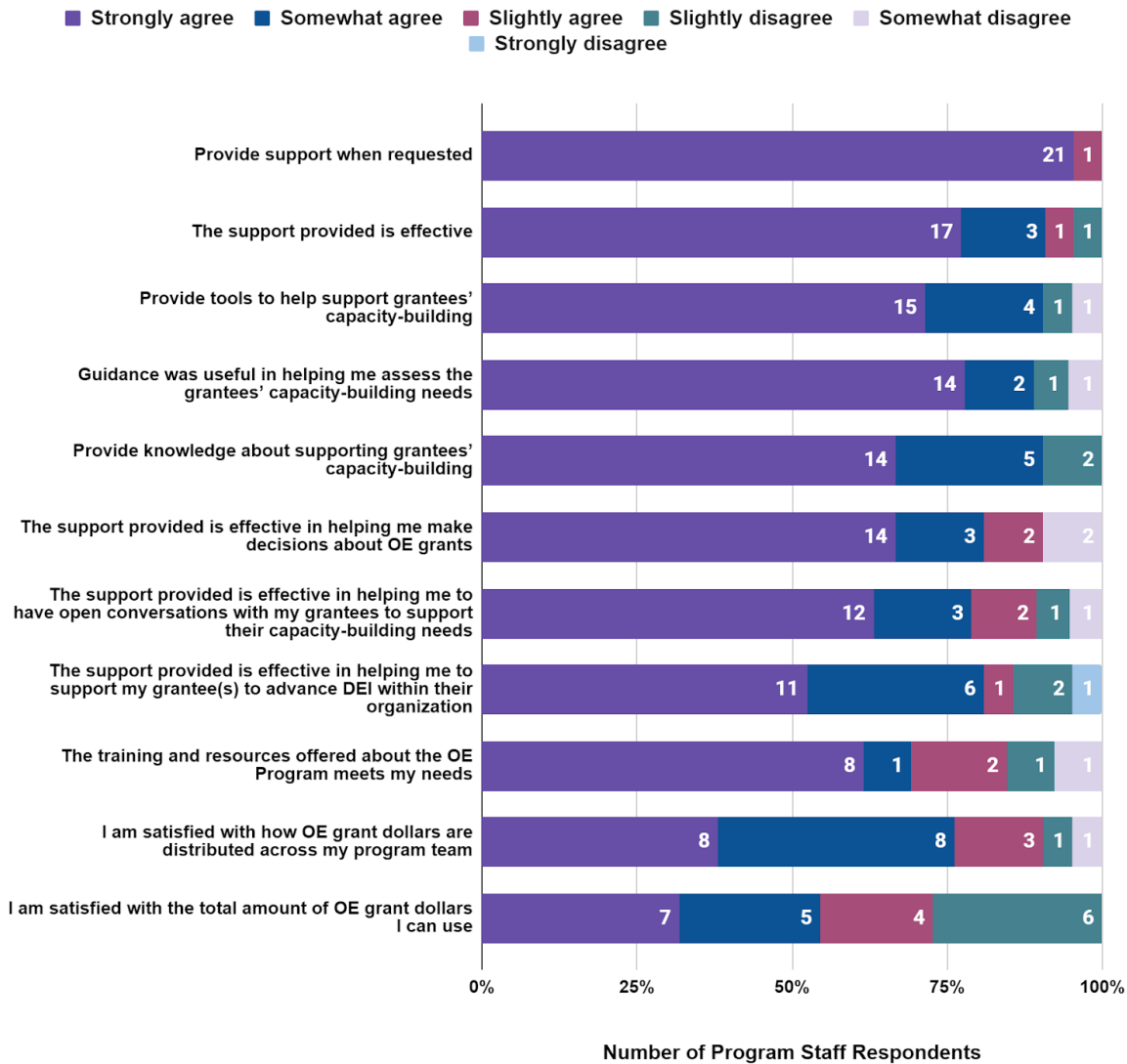
OE team support assists foundation program staff to better support their grantees.

As noted, the Hewlett Foundation's OE program aims to help grantees strengthen internal infrastructure, talent, and systems so they are better able to make an impact. Throughout this process, the OE team supports the foundation program staff over the course of their grantmaking to ensure the grantees are better set up to meet their intended outcomes. In particular, foundation program staff **strongly agreed** that:

1. OE staff provided support when requested.
2. The support that OE staff provided was effective.
3. OE staff provided tools to help support grantees' capacity building.

Foundation program staff survey respondents **slightly disagreed** when asked whether they were satisfied with the amount of OE grant dollars they were able to use (i.e., the foundation program staff would ideally like more OE grant dollars to provide their grantees with larger awards). Foundation program staff survey respondents' perceptions of OE support are presented in **Figure 6**. Additional details about the foundation program staff's perceptions of OE support are presented in **Appendix A**.

Figure 6 | Hewlett Foundation Program Staff's Perceptions of OE Support



Note: The number of responses for each statement is included on the bar. N/A responses are not included in the totals; percentages are out of the total number of responses to each statement. As such, the numbers may differ for the same percentages. To make comparisons across the statements, please compare the percentages.

Additionally, data collected from Hewlett Foundation program staff identified several strengths of the OE support provided to program staff.

- **Advice and assistance with the supporting grantee needs:** A total of 86% of foundation program staff survey respondents **strongly agreed** or **somewhat agreed** that OE staff provided them with knowledge supporting grantees' capacity. Furthermore, all foundation program staff interviewees (n = 11) identified the **help and assistance provided by the OE staff as one of the main strengths of the OE program**, because it is the most strategic part of the support.
- **Providing tools to help with grantee capacity building:** A total of 86% of foundation program staff **strongly agreed** or **somewhat agreed** that OE staff provided them with tools to help support grantees' capacity building. Several foundation program staff mentioned that a strength of the OE

program was that they were provided templates (i.e., OE templates and proposal templates) to help support their grantees. Additionally, about half of the interviewed foundation program staff mentioned that one of the main supports of the OE program was that OE staff review grantee proposals. This was corroborated by interviewed OE staff who reported assisting with the prioritization of ideas that grantees have while reviewing applications. To be further explored in the [Grantee Selection](#) section below, the prioritization of grantee ideas also helps with grantee capacity-building support.

- **OE team personality/disposition/willingness to help:** The foundation program staff shared that **one of the main strengths of the OE program is the OE team staff**. Findings from the foundation program staff survey supported this. More specifically, the foundation program staff survey respondents shared that OE staff are creative, collaborative, and receptive to new ways of supporting grantees. Further, 95% of the foundation program staff respondents **strongly agreed** that the OE staff provides support when requested. Finally, during their interviews, some foundation program staff mentioned their annual check-ins were a strength, as they allowed the OE staff to ensure the program staff and grantees were supported throughout the entire grant cycle.

“I just want to say for the record that I think [OE staff] has done a really good job. I think [they have] a really good intuition about grantees and how to work with them. And that this kind of support is only meaningful when you have someone like that, who’s really able to bridge the gap between grantees and the grantmaker. It’s not like just having the support no matter what would be useful. I think it takes the person who is really good at this to make it effective — and [they] are.”

— Foundation Program Staff Member

- **Support around consultants:** About half of the foundation program staff (across most programs) mentioned the support provided by OE to help with identifying grantee/consultant matches with regard to the OE grantees as helpful.

Foundation program staff shared additional supports that might also be helpful.

Overall, the foundation program staff felt that the OE team had many strengths and offered several supports around OE. However, program staff offered suggestions for additional supports for the OE team’s consideration; in particular, sharing learnings among program staff and program areas, providing more OE funding, and increasing OE staff capacity to provide support.

- **Sharing learnings among foundation program staff and program areas:** Most of the program staff interviewed indicated that it might be helpful to engage in shared learning across programs and program staff during OE grantmaking, potentially increasing grantee capacity building for OE grants. As one foundation program staff member shared:

“It would be helpful to have some more learning on the OE-DEI grants because that’s a little bit newer and a little bit separate from sort of traditional OE grants. And, at least for me, one thing that would be helpful is some way of learning how to translate those for a Global South context. That’s a bit of a new area and something that I would appreciate.”

- **Providing more OE funding:** Program staff who participated in the staff survey and staff interviews noted that it would be helpful to have additional OE funding for their grantees. This was corroborated by more than 25% of foundation program staff survey respondents who also indicated that they were not satisfied with the total amount of OE grant dollars they can use (see **Figure 6**). As noted by grantees in the following section, OE funds give grantees an opportunity to focus on organizational health, which is often overlooked when doing program work.
- **Increasing OE staff capacity to provide support:** Foundation program staff appreciate the ways in which the OE staff work with them, citing that the OE staff is collaborative, creative, and always available for questions. However, program staff also understand the capacity limits of the OE team, and some suggested restructuring the OE team and/or additional role clarity of the OE team, with the hope that this will result in additional OE support for staff and grantees. Additionally, findings from the staff survey indicate that program staff would like more resources from OE staff, so they are able to provide more advanced skills development and more regular resources (e.g., a monthly newsletter) to program staff. With these recommendations from the program staff, it is important to keep in mind the foundation’s lean staffing model, where the organization has relatively few staff compared to other organizations similar in grantmaking size. With about 130 staff across the organization, the lean staffing model is designed to “reinforce [the foundation’s] other commitments,” including “looking to grantees for ideas and leaving room for them to experiment and explore.”²² Thus, creative ways to provide additional support to program staff, while ensuring the lean staffing model is uplifted, may be particularly helpful.
- **Guidance around consultants and OE staff supports:** Some foundation program staff mentioned wanting more guidance from the OE team around selecting consultants to recommend to grantees. Some staff mentioned wanting additional clarity on the role of the OE staff, more specifically, understanding the capacity limits of the OE team, and that the support they are requesting is reasonable. Other staff identified the need for additional resources in the different areas of OE, to provide program staff with best practices and a consultant database.

OE team support assists foundation program staff to support grantees to achieve their intended outcomes.

In addition to dedicated funding provided through the OE grant, the OE team assists foundation program staff in building relationships with grantees. The support also provides program staff with advice, consultation, and recommendations to support grantees in building their capacity. As such, program staff believed that grantees benefited from OE grants because (1) the grant was providing funding that grantees could use specifically for capacity building, and (2) it was generally believed that capacity building was important for grantees to strengthen their organization’s programmatic work. Additionally, grantee survey respondents most frequently report that the OE program gave them the funds and

²² “Autonomy and Cooperation — Lean Staff and Flexible Procedures,” William and Flora Hewlett Foundation, 2022, <https://hewlett.org/autonomy-cooperation-lean-staff-flexible-procedures/>

resources to support organizational capacity building and dedicated support for areas that are often overlooked and not prioritized in day-to-day work.

Furthermore, about half of the grantees interviewed noted capacity building as one of the main benefits of the OE program because it gave them the opportunity to **retain the workforce, incorporate new developments into their system, and align their mission with their activities more effectively**. Grantees who participated in the focus groups also noted that **it was helpful to have supported/carved out time to internally discuss goals and strategies, gather input and set up processes for new projects, unify organizationally, and realign for the coming years**.

“It’s so rare that we ever have anything that addresses the organizational health [of the organization]... I would say that Hewlett has been providing a key resource through these OE grants that are driven by the needs of the grantees to be more effective in meeting their mission... I don’t have any other funders that have a program like this.”

— Organizational Effectiveness Grantee

Additional strengths of the OE program, reported by OE grantees, included (1) flexibility in purpose and timing, which allows grantees to address and implement changes within their organizations, and (2) the relationship with the foundation program staff. Additional grantee outcomes from receiving OE support will be explored below in **Organizational Effectiveness Grant Outcomes**.

The relationship between grantees and the foundation program staff is the most effective factor to support grantee capacity building.

The effective relationship between OE staff, the foundation program staff, and OE grantees is one of the predominant strengths of the OE program mentioned by all respondent types. As mentioned above, the advice offered to foundation program staff and grantees was noted to be helpful because it sets grantees up for success. The program staff also noted one of the benefits of relationship building is that grantees are able to be vulnerable about improvement areas in their organization, without the fear of losing funding. Grantees are able to have meaningful conversations with OE and program staff around their needs, and the prioritization of needs, to ensure that the project design is achievable and the grant amount fits the grantee’s current and most urgent needs. This sentiment appears to be corroborated by the grantees themselves. For example, 90% of OE grantee survey respondents (data shown in **Figure 11**) most often **agreed** that their relationship with their Hewlett Foundation program officer was built on trust and transparency (n = 182). Additionally, surveyed grantees frequently reported feeling comfortable talking to their program officer about organizational challenges (93%, n = 176) and feeling heard by their program officer (88%, n = 173). However, this appears to be slightly varied when examining BIPOC respondents compared to white respondents. Of the subset of surveyed grantee respondents who provided their race/ethnicity, a slightly lower proportion of BIPOC-identifying respondents (83%, n = 39) agreed that they felt heard by their program officer, compared to the proportion of white-identifying (92%, n = 98) who **agreed** with this statement.

Nonetheless, the majority of grantees discussed the relationship with their program officers as the most effective factor to support grantee capacity building. Characteristics of the grantee-program staff relationship that grantees identified as helpful included:

- **Being responsive to grantee needs**, where program officers operate like a “sounding board” and discuss foreseeable challenges to finalize/refine the project scope. Another aspect of program officer responsiveness included providing ongoing support to grantees as the project is implemented.
- **Showing interest in the work that the grantee was doing** allowed program officers to understand what the grantee needed, the issues they may have previously had, and the context and understanding of the work the grantee was involved in during the entire grant period.
- **Showing interest in the success of the grantee** through providing thought partnership, being supportive, being responsive, providing recommendations when needed, and checking in to ensure the grantee is supported were other helpful components of the grantee-program staff relationship. In addition, not using information the grantees shared in a punitive way was also indicative of a good grantee-program staff relationship.

Grantee Selection

The Hewlett Foundation program staff are primarily responsible for identifying grantees to receive an OE grant. The OE team offers guidance and support to program staff throughout the OE grant process as needed. In the next section, we discuss the main factors contributing to grantee selection, including grantee capacity-building needs, program strategy, and equity.

Hewlett Foundation program staff share information about the OE grant with grantees in a variety of ways. Regardless of the priorities uplifted by the foundation program staff, most staff discussed being **intentional** and **selective** in their information sharing and shared information about the OE grant with specific grantees, while about half of the program staff used a **general call-out** approach in their information sharing and, of those, most had used both intentional/selective and general information sharing approaches during grantee selection. Although Grants Management Systems data identified that OE grants were distributed to a variety of grantees, most grantees who were interviewed and about half of those who participated in the focus groups mentioned that they were long-standing grantees who had worked with Hewlett for many years and received more than one OE grant.

Relationship with grantees is a factor Hewlett Foundation program staff consider during grantee selection.

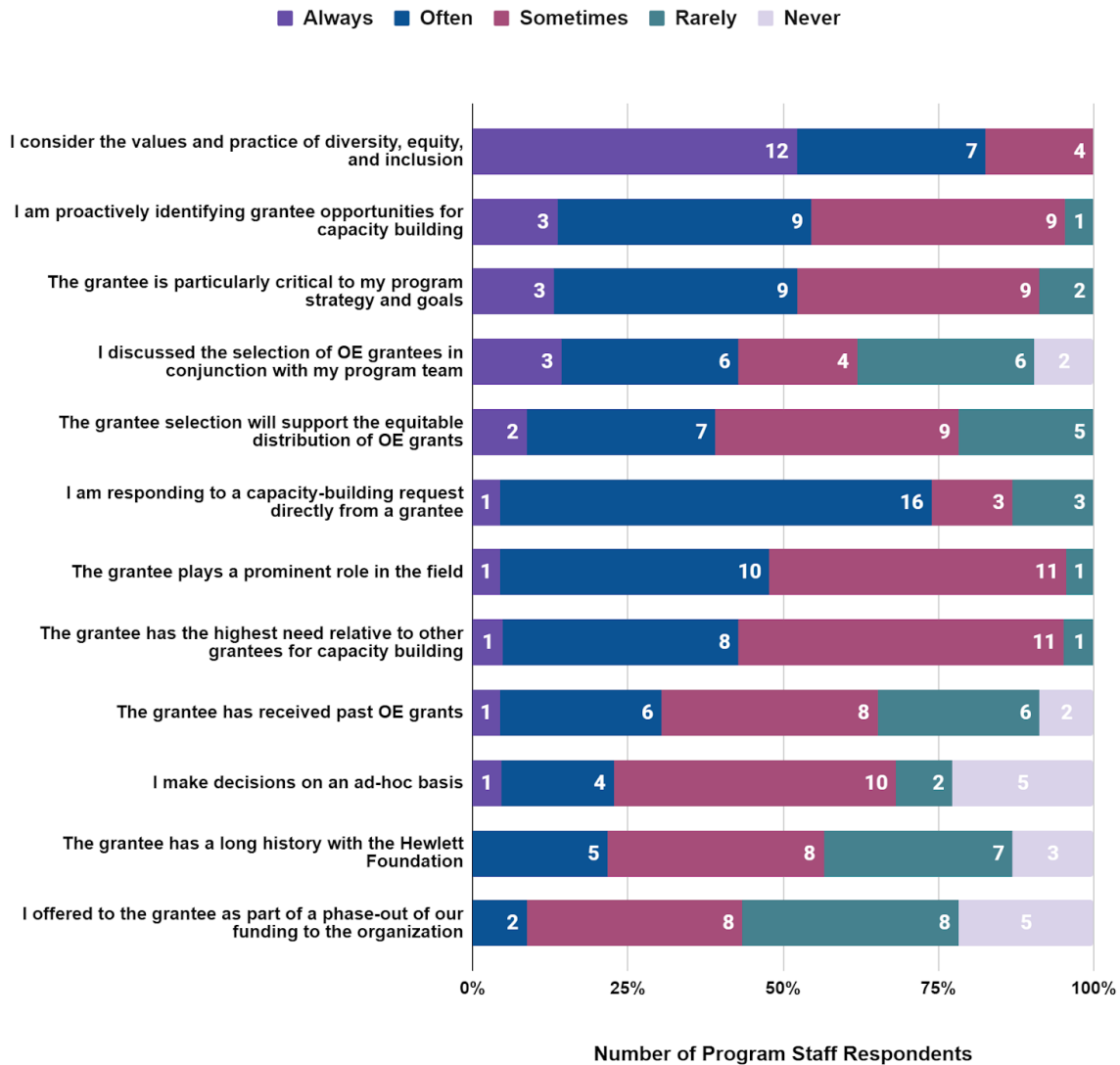
While most foundation program staff aimed to distribute grants to all grantees, regardless of whether they have received an OE grant in the past, most program staff also reported prioritizing grantees who have a long-standing relationship with the Foundation. Thus, several factors are considered and balanced by staff when considering which grantees receive an OE grant.

Foundation program staff considers an organization's capacity-building need when selecting grantees for the OE grant.

As **Figure 7** describes, program staff reported that (1) grantees largely approached them about applying for an OE grant based on grantee-identified capacity-building needs, but that the program staff would also either (2) directly approach grantees to apply for an OE grant or (3) bring up the option to apply for an OE grant to grantees they believed would be a good fit to receive the capacity-building grant funds.

More specifically, foundation program staff across all programs (70% selecting **often** or **always**, $n = 16$), selected grantees to receive an OE grant most frequently by responding to a capacity-building request ($n = 23$, mean = 3.7, SD = 0.8). A total of 50% ($n = 11$) of staff survey respondents also reported proactively identifying grantee opportunities for capacity building ($n = 22$, mean = 3.6, SD = 0.8) (**Appendix B**). Additionally, a majority of staff interviewees shared that one of the main factors they consider for which grantees receive an OE grant is the grantees' capacity-building needs, especially the needs of smaller organizations.

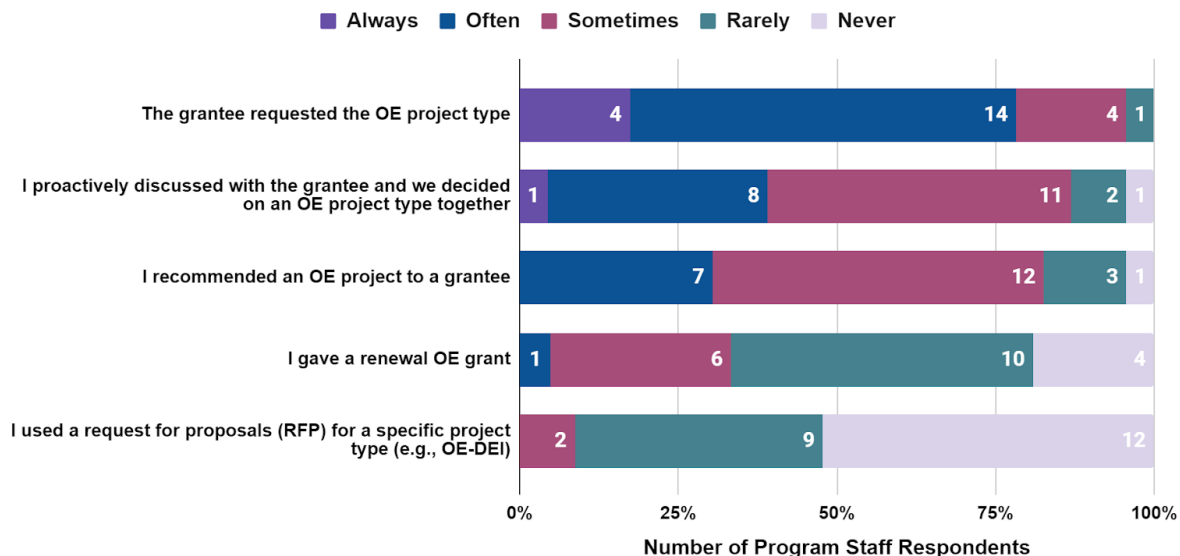
Figure 7 | Hewlett Foundation Program Staff's Reasons for Grantee Selection



Note: The number of responses for each statement is included on the bar. N/A responses are not included in the totals; percentages are out of the total number of responses to each statement. As such, the numbers may differ for the same percentages. To make comparisons across the statements, please compare the percentages.

As shown in **Figure 8**, grantees not only approach foundation staff about receiving an OE grant, but they also request the project type. Staff strongly take these requests into account when deciding the project type. More specifically, about three-quarters of the program staff survey respondents indicated that grantees' requests either **always** (17%, n = 4) or **often** (58%, n = 14) informed their OE grantmaking decision.

Figure 8 | Hewlett Foundation Program Staff’s Reasons for Deciding Which OE Project Types to Support



Note: The number of responses for each statement is included on the bar. N/A responses are not included in the totals; percentages are out of the total number of responses to each statement. As such, the numbers may differ for the same percentages. To make comparisons across the statements, please compare the percentages.

OE grantee survey findings support the foundation program staff findings regarding how grantees are selected to receive OE funding. In particular, 40% (n = 87; not shown; see **Appendix B**) of the OE grantee survey respondents reported being approached by program staff to receive capacity-building support through an OE grant. A higher proportion of non-high-frequency OE grantees reported that they were approached about receiving capacity-building support compared to high-frequency OE grantees (60%, n = 24 and 40%, n = 16, respectively; not shown). Further, a **higher proportion of high-frequency OE grantees reported requesting capacity-building support** from their program officer when compared to non-high-frequency OE grantees (58%, n = 22 and 42%, n = 16, respectively; not shown). Although speculative, those grantee organizations that previously received (or received more often) OE grants could be more likely to proactively request OE grants, perhaps due to an existing relationship with program staff or previous knowledge about the OE grant in general.

Feedback from the staff interviews found that, perhaps not surprisingly (given the focus of the OE grants), **all foundation program staff interviewed take into account the potential impact of capacity building on organizations when determining which grantees ultimately receive an OE grant.** Findings from the document review further explain that foundation program staff recognize that grantees know and can best identify their own needs. For example, grantees often help the foundation program staff identify their own capacity-building needs through discussion and request.²³ Additionally, “grantee or grantee organizations directly requesting capacity-building support from their program staff” (45%, n =

²³ “IRH Evaluation Final Report,” July 4, 2021 [internal document].

99) was the most frequently reported way grantee survey respondents described being selected for an OE grant.

A total of 75% (n = 165) of OE grantee survey respondents reported self-identifying their capacity-building needs for their most recent OE grant. The most common categories of OE grants for grantees were:

- Diversity, equity, and inclusion (41%, n = 90).
- Strategic planning (22%, n = 49).
- Communications and marketing (16%, n = 36).

When examining a subset of the OE grantees who reported their race/ethnicity, BIPOC-identifying grantee respondents less often selected that they or their organization directly requested capacity-building support from their program officer, compared to white-identifying OE grantee respondents. In particular, out of the 51 BIPOC-identifying OE grantee respondents, only 37% (n = 19) selected said they asked directly for capacity-building support, in contrast to 51% (n = 56) of white-identifying OE grantee respondents.

BIPOC-identifying OE grantee respondents also less often selected that their organization had previously received an OE grant and requested another OE grant. A total of 12% (n = 6) of BIPOC-identifying OE grantee respondents selected the option, compared to 22% (n = 24) of white-identifying respondents.

Foundation program staff considers the importance of grantees to their program's strategy when selecting grantees for an OE grant.

In alignment with the 2015 evaluation of the OE program, one of the most common factors that foundation program staff consider when selecting grantees to receive OE support is that "the grantee is particularly critical to my program strategy and goals" (n = 23, mean = 3.6,²⁴ SD = 0.8).

Foundation program staff prioritizes equitable grantmaking and a focus on diversity, equity, and inclusion values when selecting grantees for OE grants.

Focus on equitable grantmaking. Most program staff mentioned several changes in their approach to selecting OE grantees, including a shift away from ad-hoc grantee selection toward more equitable grantmaking.

Across foundation program staff, the equitable distribution of grants was defined as either:

1. Distributing to all grantees regardless of whether they have received an OE grant in the past/
2. Distributing to new organizations that did not receive an OE grant in the prior year.
3. Distributing to smaller organizations for whom the OE grant would make up a larger percentage of total funding, and thus have a greater financial impact.

It should be noted that some GEG program staff also mentioned funding many organizations internationally (e.g., Africa); however, only one staff person specifically mentioned prioritizing African

²⁴ Reported on a five-point scale, where 1 = never; 2 = rarely; 3 = sometimes; 4 = often; and, 5 = always.

organizations. Thus, geographic location may also be taken into account when thinking about the equitable distribution of grants.

Most program staff discussed equity in the distribution of grants across all grantees regardless of whether they received a previous OE grant, and equity in the distribution of grants specific to new grantees. Some program staff mentioned that they used regular grant cycles to evenly distribute grants across all grantees, while about half the program staff discussed equity in the context of prioritizing new grantees for OE grants.

Focus on diversity, equity, and inclusion values. In 2018 there was a shift due to the creation of a new Organizational Effectiveness - Diversity, Equity, and Inclusion (OE-DEI) grantmaking fund. This shift is reflected in what the foundation program staff consider when engaged in decision making about OE grants. More specifically, the **values and practices of diversity, equity, and inclusion (DEI) were the main strategies used by staff across all programs when selecting a grantee** ($n = 23$, mean = 4.3, SD = 0.8). Additionally, 54% ($n = 13$) of staff survey respondents most frequently reported supporting grantees OE-DEI grants ($n = 24$, mean = 2.5, SD = 0.5). It is possible that the creation of the OE-DEI grantmaking fund particularly emphasized the importance of considering DEI values regarding OE grantmaking, and this may be reflected in how the foundation program staff prioritize grantees to receive OE grants.

Organizational Effectiveness Grantee Capacity Building

Grantee capacity building is one of the main objectives of OE grantmaking. In this section, we discuss how the OE grantees are identifying their organizations' capacity-building needs and how the OE program is meeting these needs.

Grantees identify their own capacity-building needs.

As noted previously (in the [Grantee Selection](#) section above), **one of the top reasons that foundation program staff select grantees for an OE grant was in response to a grantee's capacity-building request, and this holds true regardless of program area or the time that program staff had been employed by the foundation.** The main strategies reported by foundation program staff for identifying grantees' capacity-building needs include that it was:

- **Grantee-driven**, where grantees requested support for a specific capacity-building project that they already had in mind.
- **Foundation program staff-driven**, where program staff suggested an OE grant type to grantees.
- **Grantee-driven with foundation program staff input**, where grantees drove identification of capacity-building needs in conjunction or with support from staff.

The use of each of the above strategies (i.e., grantee-driven, program staff-driven, or grantee driven with staff input) varied depending on certain characteristics of the grantee. All interviewed program staff mentioned that they had engaged in a solely grantee-driven strategy specifically for long-standing grantees and larger organizations. **Long-standing grantees were more likely to be aware of the OE program and its grantmaking cycles; thus, these grantees required less program staff support in identifying their capacity-building needs.**

Regarding OE-DEI projects, the majority of foundation program staff interviewed discussed engaging in a staff-driven strategy. Most staff mentioned engaging in a hybrid of grantee-driven, with program staff input, particularly for smaller or newer grantees. Foundation program staff further shared that smaller or newer grantees may need a little more support because they might not know about the OE program or might be concerned that expressing "weakness" to a funding body would damage their chances of receiving funding.

OE grantees reported identifying their capacity-building needs in a variety of ways. However, aligned with what the program staff shared, most grantees reported identifying their capacity-building needs with the assistance of their foundation program staff. More specifically, these projects were suggested by the foundation program staff in response to conversations with grantees or chosen by grantees and refined with the program staff's advice/support. Additionally, about half the grantees came to their program officer with a particular project(s) in mind. Some grantees identified their capacity-building needs by conducting an internal organizational assessment or conversations within the organization or with communities served, whereas the other half of the interviewed grantees noted that they identified their capacity-building needs when there was a strategy plan refresh or project end.

Importance of grantee buy-in for the success of the project. Program staff noted that grantee buy-in is critically important to the success of the OE grants. Grantee buy-in is increased when grantees identify their organization’s own needs. More recently, there appears to be a shift toward grantee-driven projects. For example, although the majority of foundation program staff mentioned choosing an OE grant type for a grantee in the past, recently about half the interviewed program staff discussed the **importance of grantee buy-in** to the success of a project and how buy-in can be undermined (i.e., leading to a greater risk of grantees not meeting their intended goals and a weakened funder/grantee relationship) if a project is pushed on the grantee.

While program staff recognized the importance of grantee buy-in, they also discussed the difficulty of **balancing grantee buy-in with grantee capacity building**. This was particularly discussed in relation to OE-DEI grants, which program staff felt grantees were less likely to request but are important and therefore needed to be pushed a little more. Given the importance of grantee buy-in to the success of a project and the organizational changes that OE-DEI projects bring with them, interviewed program staff noted the challenge of balancing promoting OE-DEI grants with enough grantee buy-in to ensure the success of the OE-DEI capacity-building project. Two program staff offered:

“I have a slight preference for [grantees identifying a project], but I think it’s very tricky because it’s the funder-grantee power differential, in both ways — I don’t want the funder to say, ‘This is what you have to do.’ But sometimes, like with OE-DEI, it feels like we should do that because ... the grantee wouldn’t necessarily come to us for that. It’s a little of both, so I don’t want it to seem like it’s so black and white.”

— Foundation Program Staff Member

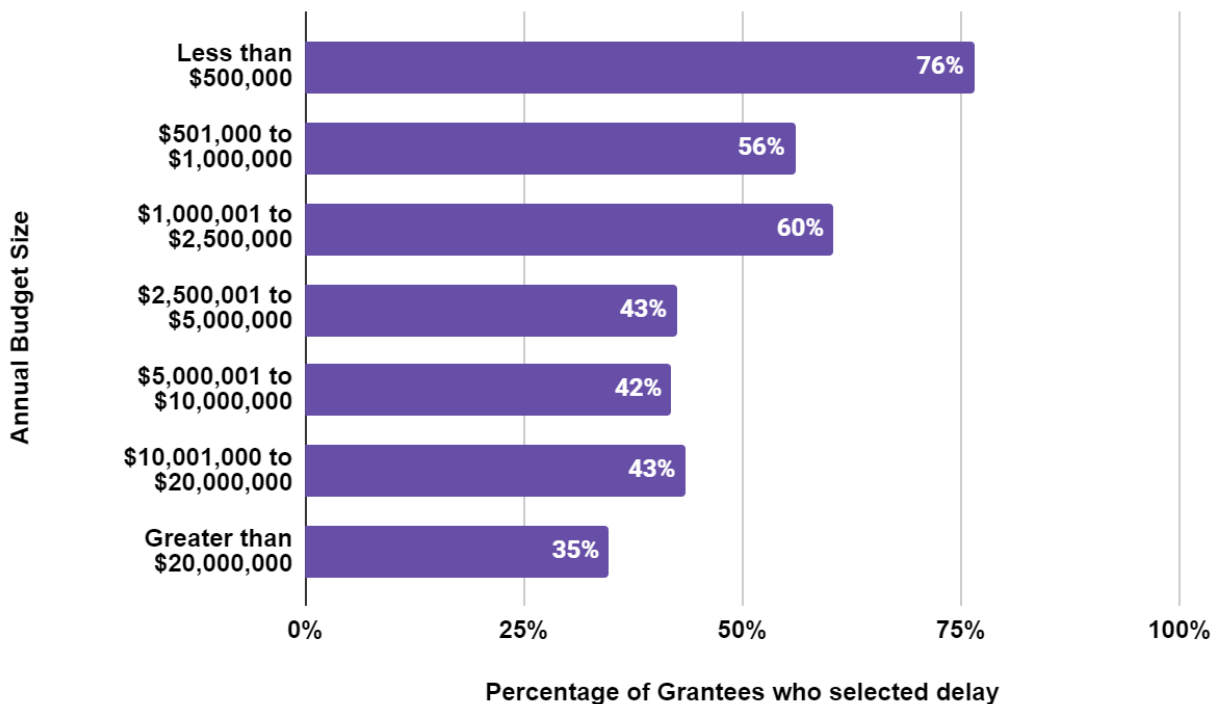
“We do talk a lot about grantee readiness.... And when we say ready, we mean not just having the leadership commitment and the staff capacity, but also the willingness to change and to change your organizational culture. Especially with OE-DEI grants, [which] can actually result in a lot of organizational change. And the organization has to be ready for that. So that’s why we don’t necessarily want the funder, the PO, to put an idea on the grantee because there’s also that funder dynamic, we want to be really careful.”

— Foundation Program Staff Member

The OE program is an important source of funding for OE grantees and largely meets grantees’ capacity-building needs.

For the most part, OE grantees identified **the OE program as an important source of funding**. As mentioned in [Program Staff Capacity Building](#), the OE program gives grantees the funds and resources to support organizational capacity building and dedicated support for areas that are often overlooked and not prioritized in day-to-day work. When asked how grantees would have funded their work around capacity building if they had not received an OE grant, nearly half (49%) of grantee survey respondents (n = 107) indicated that they **would have delayed or chosen not to invest in capacity-building work** due to competing priorities if they had not received a Hewlett OE grant. As **Figure 9** describes, a higher proportion of respondents from organizations with smaller annual budgets (compared to those with larger annual budgets) generally selected that they would have delayed or chosen not to invest in capacity-building work.

Figure 9 | Breakdown of Annual Budget Size of Organizational Effectiveness Grantee Organizations That Would have Delayed or Not Invested in Capacity-Building Work without an OE Grant

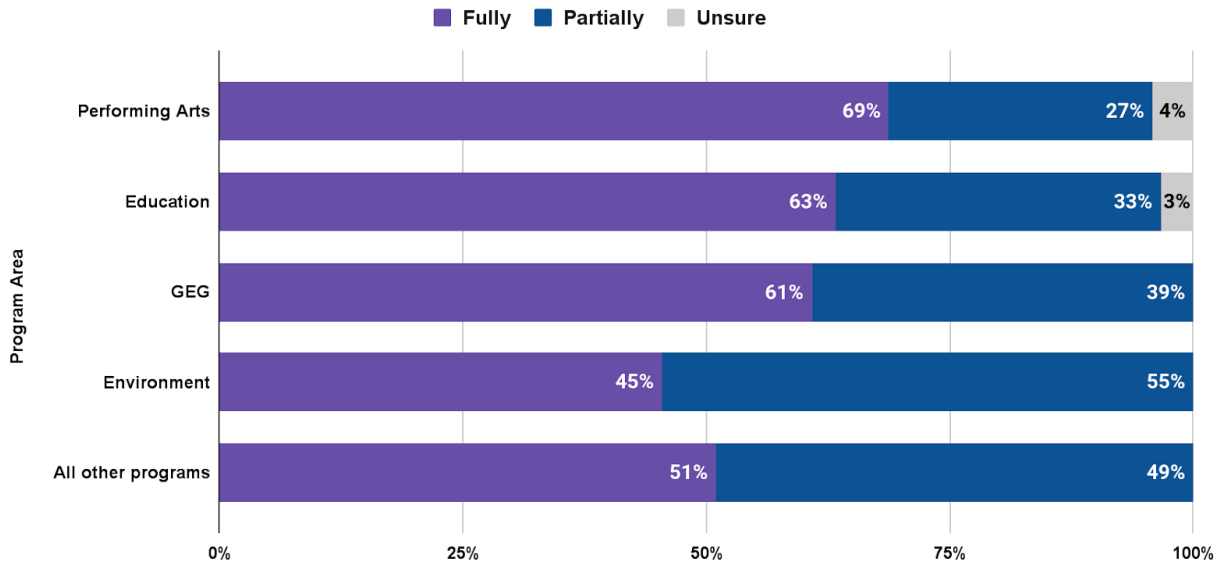


Among a subset of grantee respondents who indicated their race/ethnicity, those who identified as white also more often selected that without the OE they would have chosen to delay or not invest in capacity-building work, compared to grantee respondents identified as BIPOC (55%, n = 61 and 38%, n = 19, respectively). However, a higher proportion of grantee respondents who identified as BIPOC selected that if they had not received a Hewlett Foundation OE grant, they would have waited and reapplied to the foundation again (24%, n = 11) when compared to the proportion of grantee respondents who identified as white (10%, n = 10).

Similarly, about half the OE grantee focus group participants said that if the foundation had not provided the OE grants, they would have **tried to source the work internally**; however, grantees also shared that they felt the **work would not have been done as well nor to the same extent**.

Importantly, it appears that the OE program is largely meeting the needs of grantees. Over half of grantee survey respondents stated that the OE grant **fully** or **partially fulfilled** their needs (59%, n = 131 and 39%, n = 87, respectively). When examining OE grantees that responded to the grantee survey separately by foundation programs, a higher proportion of grantees from the Environment Program selected more often that the grant only partially fulfilled their needs (55%, n = 24) compared to grantees from the Education (33%, n = 10), GEG (39%, n = 18), and Performing Arts (27%, n = 13) programs, respectively (**Figure 10**). However, it should be noted that there were varying numbers of grantees representing each of the Hewlett programs.

Figure 10 | Fulfillment of Organizational Effectiveness Grantee Capacity-Building Needs by Hewlett Foundation Program Area

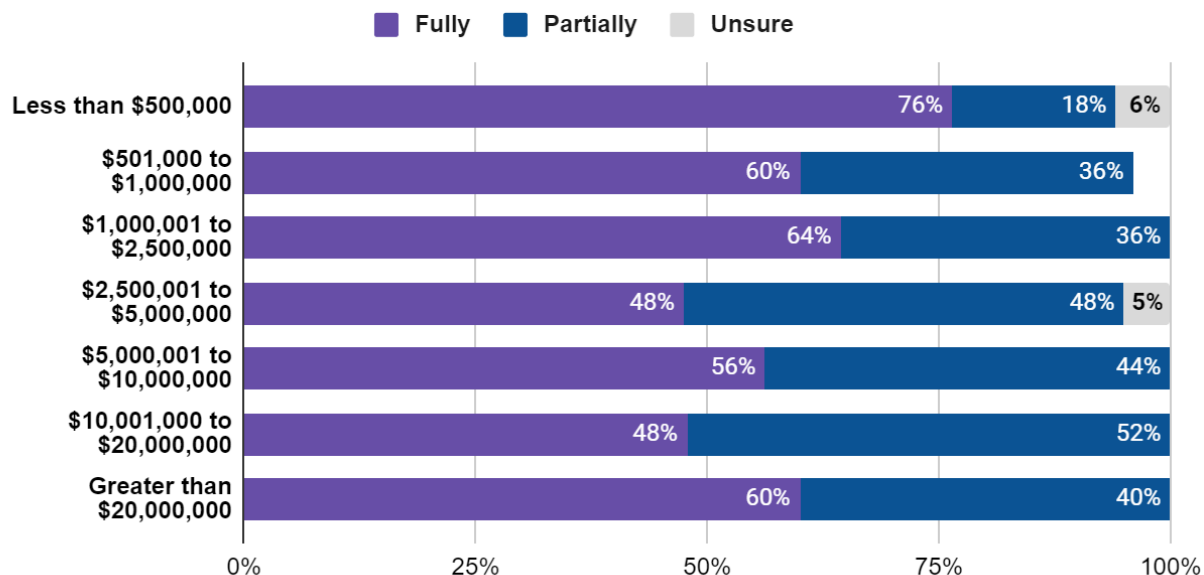


Note: Although data from other programs are included in the survey findings, to maintain confidentiality, data were only disaggregated across programs that had more than 10% grantee representation: GEG, Education, Environment, and Performing Arts. All other programs were combined into one single grouping. N/A responses are not included in the totals.

Additionally, when looking at organizational budget size, a higher proportion of grantee survey respondents whose organizational budget size was less than \$2,500,000 more frequently reported the OE grant fully met their needs, when compared to organizations whose budget size was greater than \$2,500,000. More specifically, grantee survey respondents who reported an organizational budget of less than \$500,000²⁵ more often selected that the OE grant fully covered their needs (76%, n = 13) compared to all other organizational budget sizes (**Figure 11**).

²⁵ When examining the program area by annual budget size, the **Performing Arts Program tends to have grantees with a smaller annual budget size compared to Education, Environment, and GEG programs** (see Appendix J).

Figure 11 | Fulfillment of Organizational Effectiveness Grantee Capacity-Building Needs by Organization Annual Budget Size



These findings mirror the perceptions of a few foundation program staff, who noted that the **OE grant makes up a greater proportion of overall funding for smaller grantee organizations**. As a result, these program staff sensed that smaller grantee organizations experience a greater benefit from the OE grant when compared to larger grantee organizations, and that this may be due to the OE grants representing a larger proportion of their total annual budget.

While the OE program was identified by most OE grantees as an important source of funding, without which OE grantees would be unable to ever complete the work or complete the work promptly, some OE grantees did indicate that their organization’s needs were not fully met (n = 90²⁶). The most frequently reported reasons OE grantees indicated that their organization’s needs were not fully met included that the:

- Project scope was too large to be covered by the OE grant (50%, n = 45).
- Funding amount did not cover the full cost of the work (47%, n = 42).

Given that these reasons are highly related, it appears that, while the OE funding fills an important need, for about half of the OE grantees the amount of funding provided may not adequately cover the true costs of the work undertaken. However, the OE program has been shifting toward covering more of the total costs of projects (which is corroborated by the OE grantees through a comparison of the 2018 Grantee Perception Report to the 2021 Grantee Perception Report²⁷). To further explain, the majority of

²⁶ 91 respondents indicated that their needs were not fully met by selecting **yes, partially, no, and unsure**. The sample represents all grantee survey respondents who provided additional information about why their needs were not fully met by the OE grant.

²⁷ The Center for Effective Philanthropy, “The William and Flora Hewlett Foundation 2021 Grantee Perception Report — Organization Wide,” February 17, 2022, <https://hewlett.org/wp-content/uploads/2022/02/2021-Grantee-Perception-Report.pdf>.

foundation program staff discussed a shift to **true-cost funding**: the idea that grant funding should aim to cover the direct and indirect costs of implementing a project.²⁸ A shift toward true-cost funding would allow the grant to cover the full amount of the work, rather than a portion. Thus, with the foundation's shift toward true-cost funding, the concerns shared by some of the surveyed OE grantees regarding the OE grant not fully meeting their organization's needs may likely be addressed.

²⁸ Direct costs are directly attributable to the project such as materials, consultants and staff salaries, and would not be incurred without the existence of the project/program, while indirect costs include general overhead that support an entire organization and that might be shared across projects, such as rent, equipment, and administrative staff. Larry Kramer and Sara Davis "A Step Toward Supporting the True Cost of Nonprofits' Work," *Ideas + Practice* (blog), August 16, 2019, <https://hewlett.org/a-step-toward-supporting-the-true-cost-of-nonprofits-work/>.

Organizational Effectiveness Grant Outcomes

In general, the intended outcomes of the OE grant are to improve grantees' organizational health. In this section, we discuss the benefits of the OE program and what grantees were able to accomplish as a result of the OE grant, unintended consequences of the OE grant, and areas of growth for the OE program.

Grantee capacity building is one of the main benefits of the organizational effectiveness program.

All included data sources for this OE evaluation corroborated, perhaps not surprisingly, that OE grantee capacity building (both in terms of monetary and non-monetary supports) is one of the main benefits of the OE program. For example, most OE grantees who answered open-ended survey questions described the program's ability to **support their organizational capacity building** as a major benefit of the program.²⁹ These results were corroborated by qualitative data provided through OE grantee interviews and focus groups, in which about half of the OE grantees who participated mentioned that **capacity building was a positive outcome of receiving an OE grant**. Capacity building was described by an OE grantee as not only "focusing on the task at hand" (i.e., addressing the immediate needs of the organization), but also (1) building infrastructure to support the same or similar tasks in the future, (2) the ability to hire additional staff or retain current staff, and (3) staff learning new skills through exposure to a new project. In the focus group, two OE grantees explained their experiences with capacity building:

"The skill set of our communications team has expanded given new exposures to current web design considerations and processes. While not always a delight, this valuable education (some of these things are quite tricky!) will inform our collective work together and our individual long-term career paths."

— Organizational Effectiveness Grantee

"The consultants we are working with are not only helping us with our capital campaign – which would be difficult without their help – but they are also working with us to build our capacity around our existing fundraising. They are helping us to engage our board more in annual fundraising initiatives, and guiding us through the process of expanding our donor base, which will support our growth and sustainability in years to come."

— Organizational Effectiveness Grantee

Aligned with the OE grantee and foundation program staff perceptions of the capacity-building benefits of OE grants, the background document review indicated that OE grants bolstered OE grantees' organizational support needs by allowing grantees the time to focus on institutional strengthening, including taking stock of the field and considering opportunities for innovation.³⁰ Without OE grants,

²⁹ 132 grantees identified "supporting organizational capacity building" as a benefit in response to either grantee survey Q13: What did the Organizational Effectiveness (OE) grant allow you/your organization to do that you would otherwise not have been able to accomplish? (Answered by 171 respondents.) Or in response to grantee survey Q16: Overall, what would you say are the OE program's greatest strengths? (Answered by 178 respondents.)

³⁰ Kristy Milward, Nina Harstard, and Alexandra Geertz, "Evaluation of the Hewlett Foundation's International Reproductive Health Strategy, 2014-2020: Final Report," (n.d.), <https://hewlett.org/wp-content/uploads/2021/08/IRHGRE-Evaluation-2021.pdf>.

grantees shared that **institutional priorities would fall behind other priorities**.³¹ Likewise, consultants who were interviewed also stated that the OE grants **allow grantees to bring in expertise and also step back and look at the bigger picture to focus on the infrastructure of their organizations** (see section [COVID-19 Emergency Financial Technical Assistance Program](#) for more details about consultants).

Receiving foundation OE grant support itself is helpful because it allows dedicated time, space, and funding to focus on organization capacity building.

The OE grant is awarded to current Hewlett Foundation grantees in addition to their programmatic or general operating support (GOS) funding. A total of 75% of grantee survey respondents **agreed** (and 16% of grantee survey respondents **slightly agreed**) that the OE grant provided support for a project for which they would not normally receive funding. Across program areas, the proportion of grantees who disagreed with this statement was higher among the Performing Arts Program, compared to grantees from other program areas (however, it should be noted that the amount of this proportion was small and was not tested for statistical significance).

As mentioned in the [Program Staff Capacity Building](#) section above, grantee survey respondents described the OE program as **providing dedicated support for areas that are often overlooked and not prioritized in day-to-day work** as a major benefit of the program. Similarly, several of the grantees and about half of the foundation program staff identified the funding provided to grantees to improve organizational health as one of the main benefits of the OE grant. Additionally, a few program staff described how the OE grant, being a separate category of funding, allowed the grantee to internally justify the expenditure against other competing funding priorities, which ensured that the capacity building was prioritized and completed.

As an example of how OE grantees use the dedicated time afforded to them by the foundation's OE grant support, about half the grantees who participated in the focus groups, and some of the grantees who completed an interview, described the OE grant as giving them the resources to carve out time to **internally discuss organizational goals and strategies to unify the organization and re-align/plan for the upcoming years**. As one OE grantee shared:

“During the cycle of this grant, we dove very deeply into [a] conversation about who we are, who we serve, who is not at the table, and who should be invited. We’ve built out equity as a focal point within our staff, board, and programming to an even greater degree, both internally and externally. We established a new mission statement from an equity-based lens. We also focused on updating and refining our policies in order to better reflect our values. We are continuing to ask these questions on a daily basis of ourselves and the communities that we serve. This work is deeply tied to [our mission] as a space built to be an inclusive cultural hub.”

— Organizational Effectiveness Grantee

³¹ Ibid.

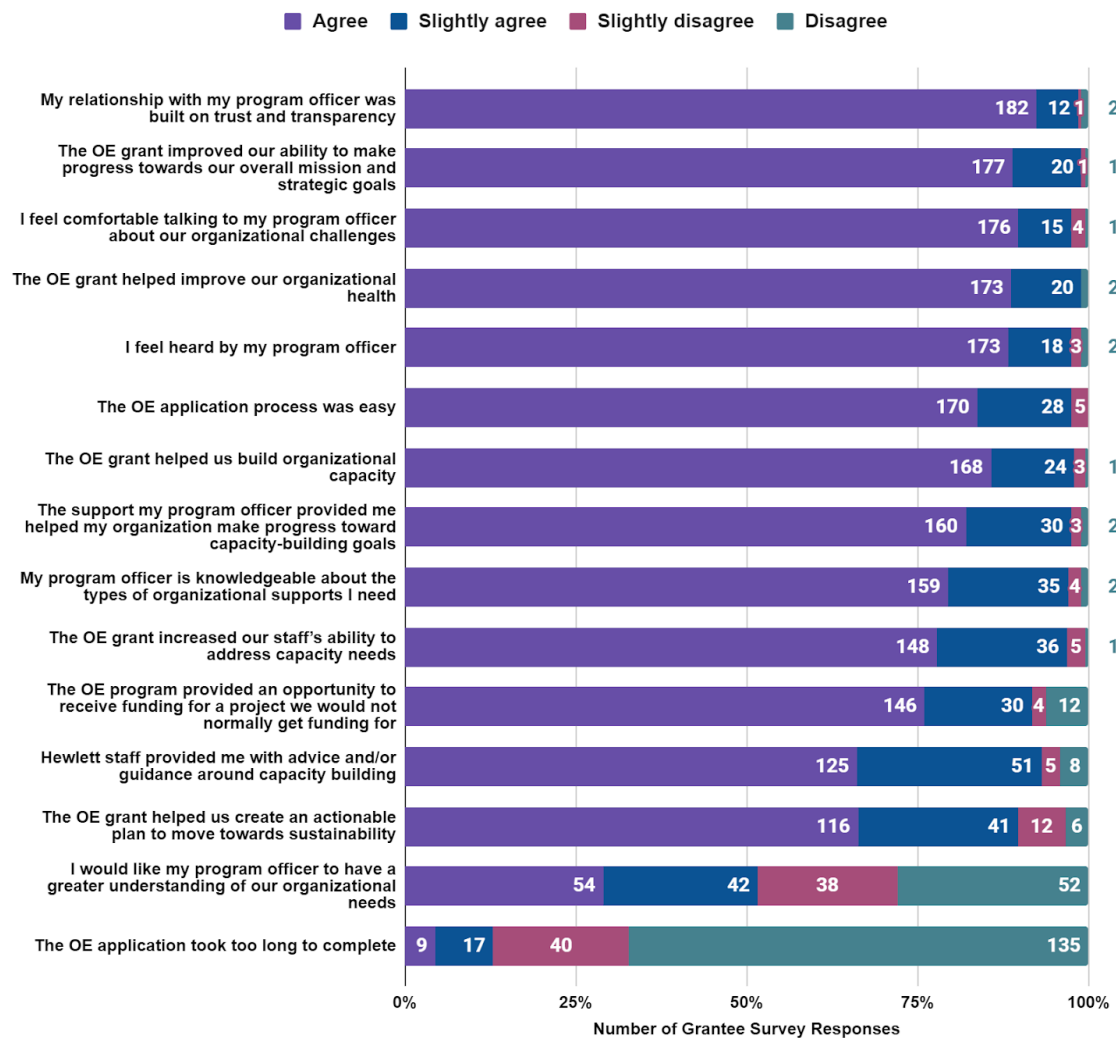
Additional OE grantee perceptions of the OE grant.

Figure 12 shows grantee perceptions of the OE grant and non-monetary supports provided by the Hewlett Foundation program staff. Grantee survey respondents frequently agreed that the OE grant:

- Improved the ability to make progress toward their overall mission and strategic goals.
- Helped improve their organizational health.
- Helped build organizational capacity.

However, it should also be noted (and as shown in Figure 12) that slightly more than half of grantees indicated that they **agreed** or **slightly agreed** that they would like for their program officer to have more of an understanding of their organizational needs.

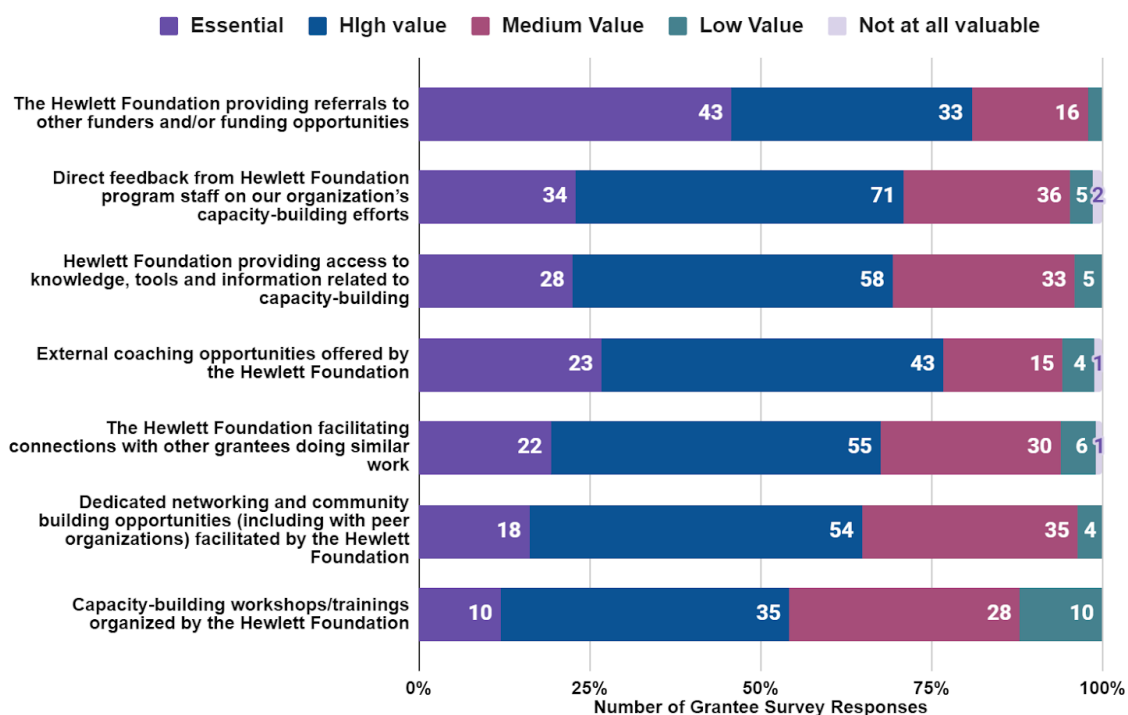
Figure 12 | Organizational Effectiveness Grantees’ Perceptions of the Organizational Effectiveness Grant and Non-Monetary Supports



Note: The number of responses for each statement is included on the bar. N/A responses are not included in the totals; percentages are out of the total number of responses to each statement. As such, the numbers may differ for the same percentages. To make comparisons across the statements, please compare the percentages. The numbers on the far right correspond to the number of grantees who selected “disagree” for the corresponding statements.

As can be seen in **Figure 13**, grantees found the OE team’s non-monetary support very valuable as well. Indeed, most grantees found the non-monetary supports to be at least of medium value, if not more (indicated by the purple, green, and maroon). Further, almost half (46%, percentages not tabled) of grantees (n = 43) who responded reported that the Hewlett Foundation’s support through providing referrals to other funders and/or funding opportunities was essential. Nearly one-fourth (23%, percentages not tabled) of grantees (n = 34) stated that receiving direct feedback from the Hewlett Foundation program staff on their organization’s capacity-building efforts was also essential.

Figure 13 | Organizational Effectiveness Grantees’ Perceptions of the Non-Monetary Support Value



Note: The number of responses for each statement is included on the bar. N/A responses are not included in the totals; percentages are out of the total number of responses to each statement. As such, the numbers may differ for the same percentages. To make comparisons across the statements, please compare the percentages.

Additional benefits of the OE program.

Additional benefits of the OE program include the **flexibility of the funding and the timeline of its implementation** and **relationship building between the foundation/program staff and grantees** (also discussed in detail in the [Program Staff Capacity Building](#) section).

About half the foundation program staff interviewed described the OE grant as **flexible, agile, and responsive** to funding grantees’ needs, and described the reporting requirements as **lighter** than other grant types. This was corroborated by the interviewed grantees who described the OE program funding as **“flexible in purpose and timing to allow grantees to address and implement changes within their organizations”** and as **“supportive and responsive to their organization’s needs and context, and deadlines.”**

Relationship building was also identified as a benefit by the document review, foundation program staff interviews, and grantee surveys and interviews. As mentioned above in **Program Staff Capacity Building**, the relationship between the foundation’s program officers and grantees is the most effective approach to support grantee capacity building, thereby leading to better project outcomes. More specifically, some foundation program staff discussed a byproduct of the OE program was giving **grantees a chance to talk to their program staff and consequently strengthen the relationship**, leading to more candid conversations and **stronger organizations as a result**. Grantees corroborated this outcome, with a few interviewed grantees sharing that foundation program staff make an effort to understand their organization and provide support and recommendations. Additionally, approximately 15% of grantees who answered the open-ended survey questions identified their relationship with their program officer as a benefit resulting from the OE program.³²

The unintended consequences of the OE program varied across respondent types.

Several unintended consequences of the OE program were offered across the different respondent types that participated in this evaluation. However, the most consistent unintended consequences of the OE program were differences between **U.S.-based and international grantees**, particularly with OE-DEI grants, and **challenges associated with not covering the true cost of the OE work**.

Differences in DEI **between U.S.-based and international grantees** were identified in the document review and by a few foundation program staff as an unintended consequence of the OE program. More specifically, foundation program staff described the funding arrangements for nonprofits outside the U.S. as more restrictive, in terms of what they can receive from the foundation, which made it difficult to support these organizations. Additionally, foundation program staff described challenges with identifying **what advancing DEI means for organizations in the Global South and African organizations**. This is consistent with findings from the document review which also identified challenges with identifying what DEI means and how to implement it in Africa. For example, grantees received OE grants specifically for their internal DEI work as part of the foundation’s effort to support reproductive health for women in Africa.³³ While grantees endorsed the importance and utility of DEI, findings from the interviews indicate that DEI is a lower priority for international grantees’ work because the **concept of DEI does not map cleanly onto in-country and regional contexts in Africa** as they do in the United States.³⁴ Findings from the International Reproductive Health Strategy evaluation indicate that international and regional contexts should be taken into account while considering DEI language; that is, DEI concepts should also

³² 27 (15.2%-15.8%) grantees identified “relationship with their program officer” as a benefit in response to either grantee survey Q13. What did the Organizational Effectiveness (OE) grant allow you/your organization to do that you would otherwise not have been able to accomplish? (answered by 171 respondents overall) or in response to grantee survey Q16. Overall, what would you say are the OE program’s greatest strengths? (answered by 178 respondents overall).

³³ Kristy Milward, Nina Harstard, and Alexandra Geertz, “Evaluation of the Hewlett Foundation’s International Reproductive Health Strategy, 2014-2020: Final Report,” (n.d.), <https://hewlett.org/wp-content/uploads/2021/08/IRHGRE-Evaluation-2021.pdf>.

³⁴ “IRH Evaluation Final Report,” July 4, 2021 [internal document].

take into account the various intersectionalities, where capturing such identities as “caste and kinship” might better describe exclusionary practices internationally.³⁵

Additionally, a few foundation program staff mentioned that OE-DEI grants can often uncover additional unexpected challenges, such as staff turnover for grantees, regardless of whether they are U.S.-based or not. One program staff member shared:

“For example, an organization ... wanted to make changes to their board. Because of that, they ended up losing a lot of board members who were very generous with their giving to the organization. So it caused a fundraising type of challenge. Even though in the end, this is the direction that the organization did want to go in and they thought it was important to shift their priorities.”

— Foundation Program Staff Member

Challenges with not covering the true cost of OE work were identified in the document review, and by a few program staff and grantees who completed an interview.

While program staff also identified indirect costs of the OE program as an unintended consequence, staff discussed this in terms of additional expenditures that grantees may incur as a result of deploying an OE project. For example, staff described challenges with the additional **implementation costs to grantees once the OE project deliverable — such as a strategic plan or communications plan — had been completed and put in place**. Similarly, the document review identified indirect costs as additional expenditures as a consequence of the OE program. In the Grantee Perception Report (GPR), grantees were explicitly surveyed about indirect costs. While foundation respondents in the 2021 GPR described the process for setting these costs as straightforward, grantees reported some challenges with indirect costs, such as:³⁶

- 31% reported that grant funding did not cover all indirect costs for their organization.
- 8% said the grant did not cover even the direct costs of the work.

As mentioned previously, foundation program staff discussed a shift to **true-cost funding**: The idea that grant funding should aim to cover the direct and indirect costs of implementing a project. However, as of yet, based on the grantees surveyed, it does not appear that the OE grants are covering the full amount needed to implement projects. One grantee noted in the 2021 Grantee Perception Report that the time for staff to manage consultants is “not insignificant” and is covered by the organization’s other funds.³⁷

³⁵ Kristy Milward, Nina Harstard, and Alexandra Geertz, “Evaluation of the Hewlett Foundation’s International Reproductive Health Strategy, 2014-2020: Final Report,” (n.d.), <https://hewlett.org/wp-content/uploads/2021/08/IRHGRE-Evaluation-2021.pdf>.

³⁶ The Center for Effective Philanthropy, “The William and Flora Hewlett Foundation 2021 Grantee Perception Report — Organization Wide,” February 17, 2022, <https://hewlett.org/wp-content/uploads/2022/02/2021-Grantee-Perception-Report.pdf>.

³⁷ The Center for Effective Philanthropy, “The William and Flora Hewlett Foundation 2021 Grantee Perception Report — Organization Wide,” February 17, 2022, <https://hewlett.org/wp-content/uploads/2022/02/2021-Grantee-Perception-Report.pdf>.

Other potential unintended consequences of the OE program. There were concerns from a few foundation program staff that the OE program would become a “catch-all” for all emergencies (i.e., to include the COVID-19 Financial Technical Assistance program and other future potential short-term grants that are emergency in nature and not medium to long-term capacity-building) or a “band-aid” solution/check-box. Grantees also identified constantly changing needs during the funding period due to COVID-19 and the project not “turning out as expected”; however, these projects still “provid[ed] insights through lessons learned.”

Areas of growth for the Organizational Effectiveness program.

For the most part, grantees felt that the OE program was invaluable and had no further recommendations; only 39% (n = 94) of the surveyed grantees responded to the open-ended survey questions requesting suggestions for improvement. Of those, 35% (n = 33) had only positive feedback with no recommendations other than to continue offering the support and how valuable it is. With regard to improving the OE program, one grantee shared:

“Please continue this program, grow it, and encourage other funders to offer these types of grants. The areas the OE grants support are very difficult to find funding for, but super important to the ability of nonprofits to carry out their work.”

— Organizational Effectiveness Grantee

Areas for growth tended to vary across respondent types who participated in this evaluation. However, the most consistently suggested areas of growth came from the grantees via the survey and interviews and included:

- **Improvements in funding**, including more flexible grant dollars and multiyear funding.
- **Improvements with reporting**, including opportunities to incorporate new learning uncovered by the first phase of a project, to report institutional challenges that may have impacted the planning or implementation of the project, and the opportunity to provide verbal reports.
- **Clearer guidelines around funding** to provide grantees realistic expectations around possible projects and future revenue streams.
- **More promotion of the OE program to grantees** so they are aware of when and how the funding becomes available, and encouraging other foundations to make OE-type funding more common.

“The OE program could benefit from additional follow-up grants in more focused areas identified during the initial grant. It may also be helpful for grantees to meet with their [program officers] and be frank and honest about any major org challenges, without the worry of how this could affect future funding opportunities with the foundation. Part of the OE program’s strength is in how it requires organizations to be very honest and candid. To be able to reflect on these insights with the [program officer], and plan for better support in the future (perhaps via smaller OE grants), would be tremendous.”

— Organizational Effectiveness Grantee

One interviewed grantee noted that more funding was particularly important because **real change was not possible without multiyear funding** and the foundation needs to recognize the **part that philanthropy has played in the historic undercapitalization of communities of color**. This grantee further explained:

“I also think that there needs to be a recognition from the foundation about the historic undercapitalization within organizations coming from and serving communities of color, and how philanthropies even played a role in this. Again, while Hewlett’s been really great, and I think their portfolio is reflective of [our area’s] diversity, while this is welcome financial resources, in and of itself, to really make true change, the investment needs to be much more significant and ongoing. I would even venture that it probably shouldn’t be project-specific. It probably should be multiyear general operating support for a period of five to 10 years, if you really want to make substantial change.”

— Organizational Effectiveness Grantee

Other areas of growth for consideration. In addition to those most frequently shared (noted above), foundation program staff and grantees provided some additional areas of growth for the OE program, as it moves into the next phase. A few foundation program staff identified a need to refresh the OE strategy, particularly regarding *what OE is* and *what OE can achieve*. One staff member further explained that capacity building always takes longer than the typical one-year grant of approximately \$50,000, because only one area of an organization’s capacity building can be focused on at a time. This staff person additionally noted that it can be difficult to equate completing capacity-building work with the grantee organization achieving its mission. Rather, the organization’s achievements should be more along the lines of sustainability and the ability to achieve its mission.

A few program staff also noted that the sequencing of a process — the necessary steps to be taken and in what order — to address a grantee organization’s capacity-building needs is important, and can be the difference between a successful project and a less successful project.

Several areas of growth identified in the document review appear to have already been addressed, or the foundation has made progress in addressing them, based on the primary data collection as part of this evaluation. These include (1) increasing the reach for grantee selection; (2) increasing grant flexibility; (3) increasing transparency, communication, and DEI; and (4) increasing consultant support services.

An area for growth identified from the document review that could still be addressed:

- **Grantee supports:** Important grantee supports include the provision of learning opportunities; facilitation of linkages and network building; sharing of information and knowledge products; facilitating access to other funding sources; and more convening and networking opportunities with peer grantees.³⁸ As a result of grantee support, grantees reported outcomes including increased capacity, financial sustainability, and the adoption of gender equity practices and

³⁸ Kevin Bolduc, Stephanie Moline Benoit, and Cathy Zhang, “Grantee Perception Report: Organizational Effectiveness, Grantee Comments and Suggestions,” September 2018, https://hewlett.org/wp-content/uploads/2019/02/Hewlett_2018_GPR.pdf.

policies. Of note is that the foundation's open and respectful engagement with its grantees has contributed to their adoption of similar practices with their partners.³⁹

³⁹ Nana Davies, et al., "Evaluating the Hewlett Foundation's Transparency, Participation and Accountability Strategy and Grantmaking Practice for 2015-20," 2021, https://hewlett.org/wp-content/uploads/2021/08/TPA_Evaluation_English.pdf.

COVID-19 Emergency Financial Technical Assistance Program

The COVID-19 Financial Technical Assistance program (also referred to as the COVID-19 TA program) was a one-time, ~\$750,000 funding opportunity that matched about 110 grantees with financial advisors and accountants, external to the Hewlett Foundation, to provide “**confidential financial advice and support for grantees as they consider the fiscal impacts of the COVID-19 crisis on their organizations.**”⁴⁰

Of the 241 grantees that responded to the survey, 44 indicated that they were **invited** to participate in the program. Of those invited to participate, 77% (n = 34) indicated that they **did participate** in the TA program. This section reflects their experiences, as well as those of a few grantees that were interviewed, the foundation program staff, and the financial TA consultants.

COVID-19 Emergency Financial Technical Assistance program grantee selection process.

Across the foundation’s program areas, staff tended to recommend grantees for the COVID-19 TA program that were disproportionately affected by the pandemic (**Figure 14**). However, one staff person specifically indicated that while they wanted to offer the opportunity to all their grantees, they recognized the need to prioritize which grantees were invited to participate. This staff person further shared that coming up with a system to prioritize the grantees who were invited to participate in the COVID-19 TA program was challenging. **Figure 14** describes three approaches taken by four of the foundation program areas to recommend their grantees for the program.

Figure 14 | Three Approaches that Foundation Program Areas Took for Recommending Grantees for the COVID-19 Emergency Financial Technical Assistance Program

Approach	Program
Focus was on financial health, and used a financial firm to complete a portfolio analysis of financial indicators ⁴¹ for each U.S. Democracy and Environment grantee, while also including foundation program staff rankings of grantees based on need.	U.S. Democracy and Environment
Focus was on the Global South first, prioritizing grantees that were based in Africa, as well as smaller organizations.	Gender Equity and Governance
Focus was on equity, where organizations were ranked by budget, from smallest to largest. Beginning with the smallest organization budgets, all grantees with up to \$2.5 million annual budgets were offered the opportunity to participate in the program.	Performing Arts

Foundation program staff survey respondents noted that they proactively identified grantees whose financial circumstances were impacted directly by the COVID-19 pandemic (53%, n = 9) and whose work was critical to their program’s strategy and goals (37%, n = 8). In contrast, however, grantees were not

⁴⁰ “Hewlett Foundation COVID-19 Emergency Financial Technical Assistance Program: Overview for Grantees,” William and Flora Hewlett Foundation, (n.d.)

⁴¹ While all programs had access to a portfolio analysis, only two engaged in one.

always clear why they were offered and/or selected to participate in the COVID-19 Emergency Financial TA program.

One staff member in the Performing Arts Program indicated that their grantee selection process was challenging, especially in working to align the consultants with the grantees' needs. Another staff member noted that it was unclear who the decision makers were regarding the COVID-19 Emergency Financial TA program, and still another indicated that grantees were sometimes unsure of whether or not they were supposed to pay for the consultant.

As one staff person noted, at times it felt that there were "too many cooks in the kitchen," which led to some confusion among both the program staff and grantees. Taken together, clearer communication may be needed to both (1) share additional opportunities and/or eligibility for those opportunities, and (2) share the details of the offered opportunities.

Opting in (or out) of the COVID-19 Financial Technical Assistance Program

While interviewed grantees did not always know why they were invited to participate in the COVID-19 TA program, they most frequently reported opting out of this opportunity when they had sufficient financial staff capabilities in-house to respond to the pandemic (63%, n = 5), or they were not in need of financial coaching services or financially impacted by the COVID-19 pandemic (50%, n = 4), which was also described by interviewed foundation program staff.

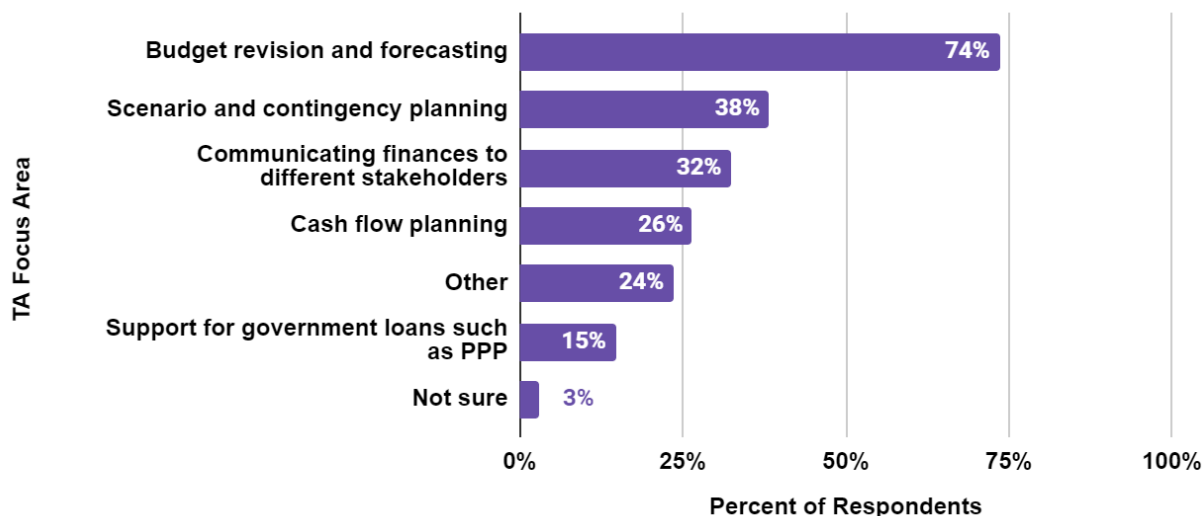
Overall Relationship Between the Grantees and Financial Consultant Firms

A total of 79% (n = 27) of the TA grantees surveyed agreed that their organization worked well with the financial consultant. The TA grantees also shared that the consultants were an important component of the COVID-19 Emergency Technical Assistance program on the consultants' pre- and post-coaching feedback survey.

One staff person shared that the consultants offered financial capacity building by providing thought partnership and other support, such as financial knowledge, templates, and tools that grantees could build upon and continue using into the future. As a result, these grantees may have increased confidence in dealing with finances. Likewise, surveyed TA grantees reported working with financial TA consultants in the following areas most frequently (**Figure 15**):

- Budget revision and forecasting (74%, n = 25).
- Scenario and contingency planning (38%, n = 13).

Figure 15 | COVID-19 Emergency Financial TA Program Focus Areas



Note: Other options included training on financial compliance, improving charts, overall financial training, economic analysis, and tax planning; N/A responses are not included in the totals.

The most helpful areas where the consultants provided support varied, but generally tended to focus on the TA focus areas in **Figure 15**. Examples of specific areas of helpful support include specific tasks (e.g., scenario planning, dashboards, trends analysis, multiyear budget planning, specific tools) and general advice/coaching/knowledge.

Learnings from the COVID-19 Emergency Financial Technical Assistance program: Strengths and opportunities for growth.

From the perspective of the TA grantees that provided feedback on the COVID-19 Financial TA program, it appears that the quality of the experience is strongly impacted by the consultant they worked with, even if among consultants in the same consulting firm. TA grantees tended to either really appreciate the relationship with the financial TA consultants or experience many challenges.

However, overall, the general sense was that the COVID-19 Financial TA program was helpful. More specifically, grantee survey respondents who participated in the program indicated that on a scale from 0 to 10 (with 10 being extremely likely), they would recommend their financial consultant to a friend or colleague (mean = 7.5, SD = 2.8). Additionally, 44% (n = 15) of TA grantees that worked with a financial consultant were promoters (score of 9 or 10) and 24% (n = 8) were detractors (score of 0 to 6). Overall, the Net Promoter Score was **favorable** at 20.5.⁴² Likewise, 81% (n = 13) of foundation program staff survey respondents who had grantees that participated in the TA program strongly agreed that they felt that their grantees benefited from the TA program.

⁴² According to Bain & Company, a score above 20 is considered favorable, as there are more “promoters” than “detractors.” Source: <https://www.qualtrics.com/experience-management/customer/good-net-promoter-score/>

Strengths: COVID-19 Emergency Financial Technical Assistance Program Largely Accomplished Its Purpose

As noted, the COVID-19 Emergency Financial TA program was offered as a one-time opportunity to support the unprecedented and devastating impacts of the ongoing COVID-19 pandemic, which has disproportionately impacted nonprofit organizations with smaller operating budgets, particularly smaller arts and cultural nonprofits.⁴³

Among the five grantees interviewed, three shared highly positive experiences. Two noted that the foundation was very responsive and thoughtful to their organizations' needs. For example, when the matching process for the final TA consultants did not work (see the [Noted Challenges](#) section below), two TA grantees noted that the foundation worked with grantees to offer a recommendation.

"I found the coaching hours to be the most beneficial. As a small org without a [name of the department] department, many of the budgeting decisions fall on me as the [role at the organization]. Being able to speak regularly with someone who understands nonprofit finance was critical during these turbulent times. Given our past engagement, we were also able to update/refine/create several tools (dashboards, trends analysis, and multiyear budget planning), that will help my org moving forward."

— Organizational Effectiveness Grantee

"The one-on-one coaching was amazing. We really liked that we were paired with a BIPOC consultant! The resources that we were provided with are ones that we have been able to return to again and again. We are so grateful."

— Organizational Effectiveness Grantee

Additionally, TA grantee survey respondents indicated that the financial TA consultants were responsive and listened to the nonprofits' needs, communicated analyses and concepts well, and provided skilled financial analysis and tools.

Likewise, the financial TA consultants who were interviewed largely felt that it was a **very positive** experience and that they "**helped [the grantees] as much as [they] could in a time of tremendous uncertainty**" and they hoped the feeling was reciprocated. Additional strengths of the COVID-19 TA program are highlighted below.

Program implementation. A few foundation program staff shared that the COVID-19 Financial TA program was relatively easy to implement, and that team coordination was a positive aspect of the program. Additionally, several foundation program staff noted that this approach allowed for an equitable approach to offering COVID-19 TA financial assistance, especially citing the Performing Arts Program as an exemplar of this, since performing arts programs, in general, tended to take a large financial hit as a result of the pandemic.

⁴³ Randy Cohen, "COVID-19's Pandemic's Impact on the Arts: Research Update May 12, 2022," May 2022, Americans for the Arts, <https://www.americansforthearts.org/node/103614>.

The program provided stability at the right time. About half of the interviewed foundation program staff noted that the program provided financial stability for grantees during a “scary” time. Several TA grantee survey respondents agreed that the program (1) came at the right time for their organization (76%, n = 26; data not shown); (2) was easy to access (68%, n = 23; data not shown); and (3) helped respond to an important need their organization had (65%, n = 22; data not shown). Further, one TA grantee noted that they were able to work on behind-the-scenes activities while waiting for everything to reopen after the shutdown from the pandemic, allowing them to “hit the ground running.”

Overall, TA grantee survey respondents identified the strengths of the COVID-19 Financial TA program as **responding to grantee needs during the pandemic** and **providing skilled, responsive financial TA consultants who were flexible in meeting grantees’ specific needs**. This was corroborated by the consultants interviewed as well. In particular, some financial TA consultants mentioned being interactive with the grantees and maintaining good engagement throughout the program. By building tools and resources together, consultants believed that it helped build grantees’ financial capacity, and allowed for more sustainable outcomes at the completion of the consultant/grantee relationship. Indeed, surveyed TA grantees mentioned that they worked with the consultants on the development of financial support tools such as spreadsheets and dashboards.

A few financial TA consultants interviewed also thought that the foundation’s shift to allow consultants to act as a trusted advisor, instead of working toward a specific task, added a lot of value to the work, as TA grantees were able to feel supported by the consultants and utilize them even after the TA was over. Additionally, a few consultants mentioned how the responsive, one-time support provided by the foundation, with limited restrictions, was forward-thinking, especially because nonprofit organizations often have to spend grant dollars in a specific way that often does not include paying rent or a mortgage to stay in business.

Some consultants found the strengths of the program to be that it exists in the first place, and that the foundation had the foresight to provide this support to their grantees when they likely needed it the most. More specifically, financial TA consultants mentioned as strengths, including: (1) the matching process, including finding the appropriate consultants to support the grantees; and, (2) how the program was set up to separate the consultant’s services from other aspects of the grantee-foundation relationship, allowing consultants to have some autonomy to use their expertise without significant oversight.

Demonstrated the foundation’s commitment to its grantees. While a more minor theme, it is important to note that some program staff and financial TA consultants shared that the COVID-19 TA program showed that the foundation was invested in its grantees. For example, program staff noted that the program helped give its grantees confidence and built upon the foundation/grantee relationship, while also allowing the space for grantees to be vulnerable about their needs. Further, many surveyed program staff shared that grantees provided positive feedback that the program was valuable, and that they felt valued and supported by the foundation. An interviewed financial TA consultant also echoed this sentiment:

[Regarding the strengths of the COVID-19 Emergency Financial Technical Assistance program]: “That it happened at all. That Hewlett engaged multiple providers, because we’re all busy, too. That they engaged internally to determine which programs thought their grantees could most benefit, that they leaned on the program officers who have the relationships to alert their grantees that it existed. That they managed the intake process and made the matches. I think all of those things were important elements, and that they were hands-off after the referral. Those would be my big highlights. And really trusting. I felt that we, as a firm, were trusted for the expertise that we could bring to deliver well for the organizations, and that trust was really important, from our perspective and appreciated.”

— COVID-19 Emergency Financial TA Program Consultant

Further, the majority of the financial TA consultants interviewed appreciated the support provided by the OE team and noted that not only was the foundation responsive to the grantees’ needs but also responsive to the consultants’ needs, including answering questions throughout the TA process. Additionally, most consultants noted how flexible the partnership was with the foundation (e.g., projects lasting longer than initially expected due to the uncertainty of the pandemic). The consultants also appreciated Hewlett putting the needs of the grantees first, and allowing for the flexibility to meet the grantees where they are (e.g., going beyond the number of original hours, if needed).

Filled an important need. Relatedly, several respondents across various respondent types noted that the COVID-19 Emergency Financial TA program filled an important need for organizations. For example, 50% (n = 12) of surveyed foundation program staff **completely agreed** that the program helped respond to an important need for their grantees at the right time. In the interviews, TA grantees also shared that they appreciated the financial capacity-building support.

Customization of the program based on grantees’ needs. One TA grantee noted that the program was a useful introductory process to help their organization identify areas that could be strengthened. This grantee further noted that the engagement resulted in some helpful recommendations that could be easily implemented; however, they also shared that the process was quite involved. Similarly, some other grantees noted that the program helped them build their organization’s financial capacity through, for example, putting in place systems that they did not previously have (such as budgeting projects and scenario planning). Some foundation program staff also cited that the pairing process of financial TA consultants to grantees allowed for the personalization/customization of addressing grantees’ needs.

Noted challenges.

While the COVID-19 Financial TA program was a one-time offering, some learnings may apply to the OE program, as well as the foundation at large. As the following section describes, several of the noted positives from the program were also cited as challenges by others. Thus, we note that the grantees’ experiences may have been highly variable, based on the financial TA consultant with which they were paired, their relationship, and perhaps the support needed from the consultants. Additionally, the financial TA consultants’ pre- and post-coaching feedback survey offered some mixed feedback, as did the current evaluation’s grantee survey and interviews.

More time with consultants to engage in the work. Across the respondent types, there was a suggestion for allowing additional time with consultants to produce deliverables. More specifically, some TA grantees felt that the consultants were not providing adequate time to provide the support they needed. Indeed, one grantee shared that the consulting firms seemed to have limited time. This grantee also noted that, particularly for international grantees, because the consultants were based in the U.S., they did not have important context — the foundation could consider allowing firms local to the grantees’ location to provide support. The need for additional support from the financial TA consultants was echoed in the foundation program staff interviews. In particular, one staff member noted that the approach used for the COVID-19 Financial TA program was anticipated to be straightforward, but that consultant capacity constraints was a barrier that was not identified during the program’s development.

Likewise, a handful of TA grantee survey respondents indicated that they felt the financial TA consultants did not deliver adequate consultation or resources to advise them in the context of the financial impact of COVID-19. For example, one grantee shared in the survey that their consultant did not understand the organization’s business, was unresponsive, and working with them caused challenges that delayed work that the grantee ended up having to complete for themselves. Another TA grantee stated that they did not meet with the financial TA consultant again past the initial consultation. A different grantee stated that their financial TA consultant appeared uncommitted, and that the organization received no outputs. Another TA grantee simply stated that “the firm did not deliver on the assignment,” and, finally, another grantee indicated that they did not get as much out of the consulting partnership as they had hoped. One grantee described this challenge:

“The direct funding of the technical assistant partner, with no supervision from the foundation, made the [consulting] partner not accountable at all. It is likely that they billed for work they did not do.”
— Organizational Effectiveness and COVID-19 Emergency Financial TA Program Grantee

It should be noted that there may have been additional constraints on the financial TA consultants that may have limited the amount of time and availability they had to provide services and support to the selected TA grantees. For example, other philanthropic organizations may have also hired these same financial TA consultants to provide financial consultation support.

While perhaps not as detailed as the information captured for the current evaluation, it is important to note that some TA grantees who responded to the pre- and post-coaching feedback survey (administered by one of the financial TA consultants) thought that the financial TA consultants did meet their immediate needs within the time frame provided, while some were unable to confidently communicate information to collaborators and noted a lack of follow-through from the financial TA consultants.

While the feedback from TA grantees who responded to the pre- and post-coaching feedback survey seemed a bit more positive, grantees who responded to the current evaluation survey and participated in the interviews with the CRS team shared more detailed information about what specific components

were challenging. Further, the consultants who participated in this evaluation largely expressed positive feelings about the COVID-19 TA program, which is in contrast to the mixed responses shared by the grantees.

Program delivery format: lack of a cohort-based approach. Somewhat related to wanting additional support from the financial TA consultants, a few grantees noted the lack of cohort-based work as one of the more challenging aspects of the foundation’s approach to TA. These TA grantees indicated that this leads to inefficiencies in coaching when a financial TA consultant has to teach, while also addressing similar grantee issues individually. Additionally, about half the consultants mentioned the time constraints to the work as a challenge to providing TA to the grantees. These consultants noted how some of the issues grantees raised would require more than what could be done within the time frame, and sometimes noted that as they worked with grantees to address one issue, additional issues would arise. In these situations, financial TA consultants noted it was difficult to build long-term capacity with the grantees.

“Sometimes as the consult[ant], we found ourselves wishing we had the opportunity for cohort-based work, where we could do training of some basics and level set, and also invite organizations to hear from each other, so that when we go into coaching, we are reinforcing what’s been learned, rather than teaching while also addressing the issue. There’s a certain degree of inefficiency in that approach, and yet the situation called for it, and we did it and it was fine, and yet as a general recommendation to Hewlett, I would encourage them to think about the value of establishing cohorts for learning and engagement individuals in the cohort.”

— COVID-19 Emergency Financial TA Program Consultant

Other noted challenges. While these challenges did not rise to the level of an overarching theme, we share them here for the overall perception of the COVID-19 TA program. One foundation program staff member mentioned that managing the COVID-19 Financial TA program also increased their workload. Two staff people shared that the ongoing challenges of the COVID-19 pandemic interfered both with their work (e.g., staff turnover at the foundation, working remotely), as well as grantees’ progress with the COVID-19 Financial TA program, as other pressing areas either delayed (resulting in extension requests) or diverted attention away.

Recommendations for Building on the Learnings

Several recommendations for the future were offered across respondent types, several of which were directly related to the challenges described in the previous section. As noted, it appears that the grantees’ experience with the COVID-19 Financial TA program varied quite substantially, and that this may have been impacted by the consultant/firm with which they were matched. Nonetheless, the following are compiled recommendations across the respondent types that the foundation and the OE program can consider as they are refining their work.

Support for foundation program staff: program implementation supports. Foundation program staff survey respondents indicated that they would like better tracking of the budget for the COVID-19 Financial TA program and additional support for interpreting financial reporting.

More flexibility/customization for consultant work. Interestingly, while the flexibility and customization were noted as a success of the COVID-19 Financial TA program, especially by financial TA consultants, it was also offered by TA grantees as an area that could be improved. For example, one grantee noted that they opted out of the program because their particular needs were not listed on the supports offered by the consultants within the time frame needed.

More foundation oversight of the consultants/more accountability. While not experienced across all TA grantee respondents who participated in the program, about half the grantees interviewed shared that they believe that if the foundation had provided additional oversight and/or changed its payment structure for the financial TA consultants (e.g., moving to payment based on deliverables rather than hours), then the grantees may have gotten more out of the arrangement and had a better experience.

Additional support. While the COVID-19 Financial TA program support was overall appreciated, one TA grantee also noted that they would like to see a second round of support to implement the activities they had worked on with the consultants during this round of funding. Perhaps relatedly, two interviewed foundation program staff shared that they would like to offer additional support, and perhaps even more programs like this, to grantees in the future.

Discussion

Successes

Overall, the findings indicated that

- The foundation program staff appreciates the support that the OE team provides them.
- The grantees perceive substantial value in the OE program.
- The foundation program staff is largely able to support the needs of their grantees.

In general, it appears that the support that the OE team provides to the foundation program staff results in the grantees largely feeling supported and able to build their organization's capacity.



A major asset of the OE program was expertise; both OE team expertise and foundation program staff expertise. For example:

- The OE team's willingness and ability to advise is the major support for program staff.
- Foundation program staff is the major additional support (beyond the grant dollar support) for grantee capacity building.

When specifically focusing on the COVID-19 Emergency Financial TA program, generally, grantees, foundation program staff, and financial TA consultants appreciated the program and thought it was a great idea; however, some aspects — such as the constraints on the amount of time that could be spent on the project, the communication, and scope — did not work as well in practice. Further, and described in more detail in the [Conclusion, Strengths, and Reflections](#) section, grantees' experiences varied.

Conclusion, Strengths, and Reflections

Conclusion

Overall, respondents were pleased with the OE program and felt that it is ultimately helpful to support grantees in their endeavors to build organizational capacity. One grantee offered that **“Hewlett is honestly leaps ahead of other foundations in terms of organizational effectiveness and capacity-building support.”** Perhaps more importantly, the **OE program is filling an important need among grantee organizations where many other funders do not.** To this end, the OE program, the OE team, and the foundation program staff largely provide the kinds of support for grantees that they appreciate. Some of these are shared below.

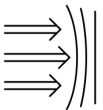
Notable Strengths of the Organizational Effectiveness Program



OE team as a great resource for foundation program staff. The foundation program staff spoke very highly of the support that the OE team provides them. From serving as a thought partner to providing more specific guidance on how to select grantees, the foundation program staff were very appreciative and felt that the OE team support, in turn, helps them to better support their grantees.



Supporting grantees in identifying their own capacity-building needs. Supporting grantees to identify their organization’s needs is a continued strength of the OE program and the foundation program staff.

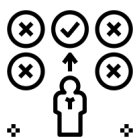


Ability to tailor/customize the OE program support. The flexibility in timing and in how the OE funding can be used is a major strength of the OE program and something that was identified by respondent types as an asset.

Reflections

Based on the totality of findings we offer several reflections for the foundation’s consideration as it is working through the OE program’s refresh. We present these as reflections for (1) the foundation program staff to support their grantees; (2) to support Foundation program staff capacity building; (3) grantee capacity-building supports; and (4) increasing the impact of OE grants. Please note that these are reflections for the foundation and the OE program to consider as it continues its important work of supporting grantees to engage in their work. These reflections should be reviewed for alignment with the next iteration of the OE program, the foundation, and its organizational culture. These are not meant to be prescriptive but rather offered as considerations.

Reflections for the Foundation Program Staff to Support their Grantees



Equitable grantee selection. For the grantees for which data on the respondent demographics were available and could be disaggregated, the analysis suggests that BIPOC respondents may not have received, nor asked for, OE funds with the same

frequency as white respondents. However, the foundation program staff shared that it has been making deliberate steps toward prioritizing equitable grantmaking and shared various means by which they shared information about the OE grant. The foundation program staff may wish to continue reflecting on what equitable grantmaking means for the OE program and examining what equitable grantmaking means in the international context, given the noted challenges (e.g., restrictions) with international grantmaking.



Grantee/consultant fit. Although this largely arose from the discussion around the COVID-19 Emergency Financial TA program, grantees' experience with the financial TA consultants appeared to vary and the experience may have been related to the consultant with whom they were matched. It should be recognized that the COVID-19 TA program was a one-time emergency response, and that the grantees that participated in the program largely had a positive experience. However, for about one-fifth of those TA grantees that had a less-than-positive experience, it appears that the grantee/consultant fit may be critically important.

Reflections for Foundation Program Staff Capacity-Building Supports



Cross-foundation information sharing. Some, but not all, of the foundation program staff indicated that it would be helpful to learn from their colleagues in other programs across the foundation about how supports are being provided to grantees, their process for selecting grantees, etc. Other foundation program staff noted that tools such as a list of go-to, vetted consultants may also help. Foundation staff who participated in the Sensemaking Session speculated that there may be differences across professional experiences in how foundation program staff responds to grantees' needs. To be responsive to this, we suggest the OE program consider instituting an OE Learning Community (or something similar), and include the foundation program staff as it is being developed to provide input on details such as format, frequency, and duration of the meetings (as applicable), and topics to be covered, among others.



Additional supports for the OE team. Beyond additional funding, some foundation program staff indicated that while the OE team provides invaluable support, they could benefit from additional resources, such as training or tools to better support their grantees. Noting that the OE team is very lean and, as such, staff recommended additional support so as to not overburden the OE team with all the requests.

Reflections for Grantee Capacity-Building Supports



Cohort-based learning provides an opportunity for grantees to network and learn from other organizations working on similar projects. Although not specifically rising to the level of a theme, within the context of the COVID-19 Financial TA program specifically, a few grantees and some consultants suggested that a cohort-based

approach could be helpful in maximizing shared learning among grantees and reducing the cost of planning and implementation across similar projects in each of the programs.

Reflections for Increasing the Impact of Organizational Effectiveness Grants



Funding considerations. Additional funding was a major area of growth mentioned by grantees and program staff alike. Foundation program staff mentioned several ways in which they creatively tried to source more OE funding from within the foundation. Outside of increasing grant sizes, the foundation could consider providing grantees with the opportunity to apply for time extensions and additional funding to grantees who have the need or opportunity to continue the work begun by a previous OE project. An additional option:

- **Continue to offer project funding that can be tailored to grantees’ needs and contexts, and are flexible in the timeline over which they are implemented.**

The Hewlett Foundation could consider reviewing how OE funding, particularly in the context of OE-DEI projects, is expected to be implemented internationally (particularly in the Global South and Africa), to provide some guidelines or examples to nonprofits in these areas.

With the Hewlett Foundation’s commitment to refresh its programs to ensure that it is as responsive to needs as possible, the findings from this evaluation can offer some generative learnings. As the OE program moves into the next phase of its existence, it may be helpful to reflect on potential opportunities for refinement. Our hope is that the findings will serve as a support for the OE program to continue its important work supporting organizational health in a **“collaborative, trusting way [to] support organizations on their own journey....[which]...is essential for the development and viability of organizations” (Organizational Effectiveness Grantee).**