



FOUNDANT
technologies

Philadelphia Common
Data Project Summary
Report

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Executive Summary:

This report summarizes the data aggregated by Foundant Technologies in conjunction with the support of Foundant clients in the Greater Philadelphia area. Background information on this project is contained in the document titled *Foundant Data Project: Identifying Opportunities for Collective Impact for Philanthropy in the Philadelphia Region*.

Foundant currently has 24 clients in the Philadelphia area, and 19 of those clients granted permission to aggregate data on their historical giving. The data set is limited to the past five years' worth of grant activity and includes data that was organically created in the system, as well as historical data that may have been migrated from the funders' previous database systems.

Extensive validation of the data presented in this report has not been performed and Foundant does not claim to be experts in methodologies for statistical analysis of large data sets. This report is intended to be a proof of concept of the potential value of aggregating data across this set of funders and further analysis and validation will be dependent upon feedback received.

Description of the Data Set:

A few parameters were utilized to define the data set for this initial study. These parameters can be modified for future iterations of the study based on feedback from the group.

- The data set is comprised of grants with a decision date between January 1, 2009 and August, 14, 2014.
- All data has been pulled from the funders' instance of Foundant Grant Lifecycle Manager (GLM) and is inclusive of grants that originated within GLM and grants that were migrated from historical data sources.
- In an effort to provide some anonymity to the data of each individual funder, only nonprofit organizations that have been funded by more than one participating funder have been included. Therefore, any organization that was only funded by one of the participating funders during the term of the study is not included.

Commonality in the Grant Management Process:

The first objective of the study is to analyze commonality in the grant management process to identify potential best practices and look for methods to streamline the grant application and grant reporting process for funders and nonprofits.

This research began with an export of all grant application questions, evaluator (pre-award) review questions, and grant report (post-award) questions. Foundant staff then used keyword matching and human interpretation to define commonality between questions that are asked by the group of funders. This exercise was challenging due to the flexibility Foundant provides to clients in how their database is configured so significant human interpretation was necessary. Note: Since no nonprofit data was included in this particular portion of the research, questions from all 24 total Foundant clients in the Philadelphia area were included in the analysis.

Top 10 Grant Application/LOI Questions:

| Question Category: | Category Reasoning: | Number of Foundations Asking this Question: |
|-----------------------|--|---|
| Attach/Provide Budget | This category includes any questions requiring applicants to include a budget. These were Program Budgets, Organization Budgets, Year or 10 year budgets, etc. | 19 |
| Funding Sources | This category was primarily outside funding sources. Questions were along the lines of: "Where is your extra funding coming from?" "What are your top 10 other donors?", etc. | 19 |
| Tax Documents | Tax Documents is any form that required the upload of a tax document. 990, IRS Letter of Determination, etc. | 18 |
| Organization Board | Organization board was any question that asked about the qualification/makeup of the organization's board. | 17 |
| Mission | Mission was any question that inquired about the Organization/Project mission, i.e. "What are you trying to accomplish?", "What is your Organization Mission?", etc. | 15 |
| Organization Staff | Organization Staff was any question that asked about the qualification/makeup of the organization's staff. | 14 |
| Expected Impact | Expected Impact is basically any question: "How will you make a difference?" This is similar to goal (but somewhat more popular). Basically, what impact will you have on the community? | 13 |
| Need | What is the community need that is to be addressed with the funding? | 13 |
| Organization History | This was a broader question. Ranged from organization beginning to success history in the organization. Grouped because they all inquired about things in the organization's past history. | 13 |
| Outcome Evaluation | This category is essentially: How do we know if your program was a success? | 13 |

Top 5 Evaluator (Pre-Award) Review Questions:

| | | |
|-------------------------------|--|----|
| Approve Request | Pretty Straightforward. Basically, if you had a choice, would you approve the request? | 14 |
| Request Ranking | On a scale (1-10, 1-5, etc.), would you approve this request? | 12 |
| Amount Approved / Recommended | What dollar amount would you approve/recommend for funding? | 10 |
| Mission Alignment | How well does this request/organization align with our mission? | 10 |
| Financial / Budget Questions | This is grouped based on questions that asked things like, "Is this a reasonable, sustainable budget?", "Is the budget clear?", etc. | 9 |

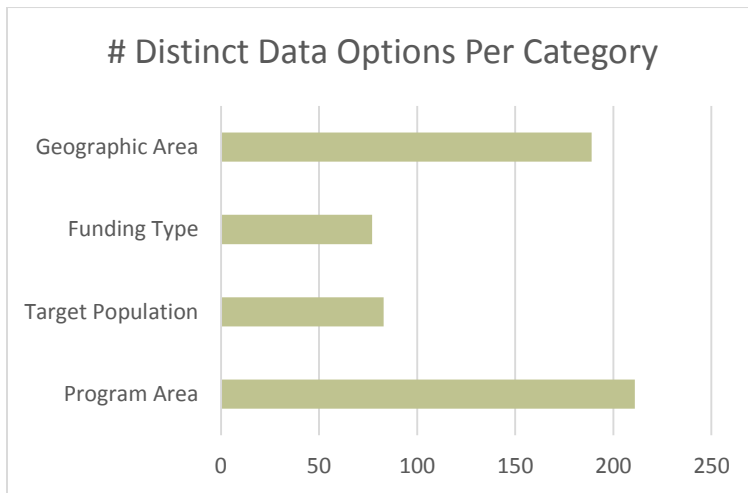
Top 5 Grant Report (Post-Award) Questions:

| | | |
|------------------|--|----|
| Outcomes | What were the outcomes of your grant? Was it successful? | 21 |
| Attach Budget | Similar to App/LOI question. Basically, "Please attach your Project/Program Budget and list the expenditures of this project". | 15 |
| Number Affected | How many people were affected by this program? What groups were affected? | 11 |
| Challenges Faced | What challenges did you have to face with your project? How did you overcome these? | 10 |
| Funds Used | What percent of the grant did you use? What will you do with the rest? How much is left? Etc. | 9 |

Summary: There is significant general commonality between the questions the funders ask of their applicants and grantees on their grant applications and grant reports. Sector initiatives such as Simplify, GuideStar Exchange, and Project Streamline could be leveraged by the funders to eliminate at least a portion of the record-keeping and other repetitive paperwork that is assigned to nonprofits today. Foundant is highly supportive of these initiatives and will be making further investments in software enhancement to make it easier for both funders and nonprofits to participate.

Methods for Coding Grant Activity:

The study investigated the ways in which the participating funders code their grant activity for reporting and analysis. There was significant commonality in the primary categories used by the funders with Program Area, Target Population, Funding Type, and Geographic Area used by many. However, the definition of each of these categories varies widely by individual funder. The table below lists the number of individual data options used by the funders within the category for which grants are coded. For example, the category called Target Population is described with seventy-seven (77) different data options across the data set. Because of this it is very difficult to analyze the current data for the purposes of identifying issues such as how much aggregate funding is being given to support a particular population group.



Summary: Aggregating data across the coding methods currently used by the participating funders would be difficult and have limited use due to the significant variance in definitions of the categories today. Foundation Center is working on a new classification system for grants to replace the NTEE classification that is currently in place. The participating funders could agree to follow a standard such as the new NTEE or set a standard of their own if aggregating data across the group is desired. If aggregating data is not desired, the current method is likely meeting the individual analysis needs of each funder even if it is not providing maximum benefit to the sector.

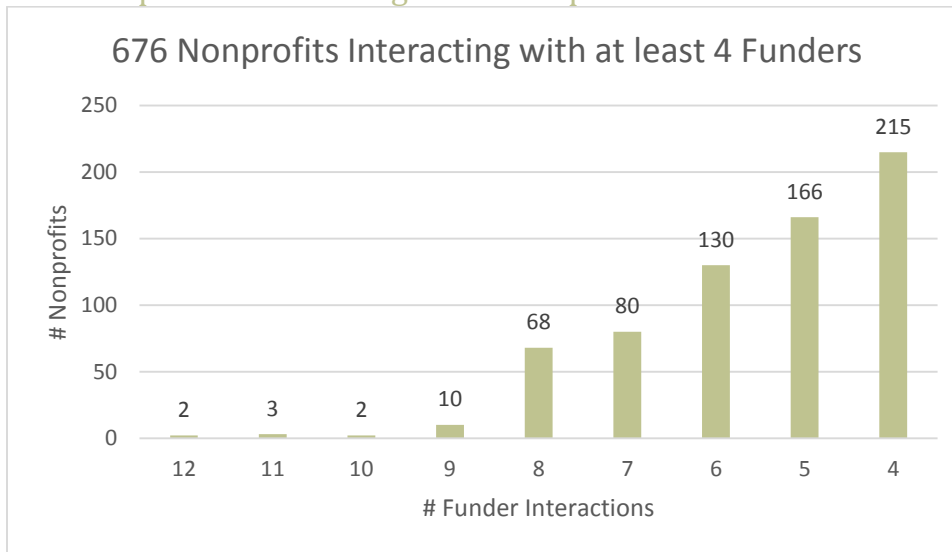
Analysis of Organizations Funded by the Group:

One of the primary objectives of this analysis is to better understand commonalities in the funding of the group to identify opportunities such as collaborative funding, reference checking, etc. Since this portion of the analysis included data about the actual grant activity of each funder, only those nineteen funders that explicitly granted permission to utilize their data were included.

Results are based on data processed in GLM or imported from historical databases with a date awarded on or after January 1st, 2009 to August 14, 2014. For the purposes of this study, an “interaction” between a funder and a nonprofit is defined as the nonprofit’s EIN residing inside the funder’s instance of GLM with either an Approved or Denied status on the request. Grantee organizations are identified solely based on the EIN associated with the grant so educational institutions and other entities that act as fiscal sponsors may mask some of the individual programs and/or organizations under their umbrellas.

The following tables display the aggregated data in multiple manners.

Number of Nonprofits Interacting with Multiple Funders:



Top 20 Organizations by Cumulative Giving:

| Organization Name | Tax ID | Number Of Foundations with Interaction | Total Denials | Total Approvals | Total Amount Granted* |
|---|------------|--|---------------|-----------------|-----------------------|
| Philadelphia School Partnership | 27-3097212 | 4 | | 10 | \$5,557,500 |
| Children's Scholarship Fund Philadelphia | 23-3078729 | 6 | 2 | 25 | \$3,099,500 |
| 11th Street Family Health Services of Drexel University | 23-1352630 | 8 | 3 | 30 | \$2,132,653 |
| University of PA Health System | 31-1538725 | 7 | 27 | 39 | \$2,083,063 |
| The Children's Hospital of Philadelphia (CHOP) | 23-1352166 | 2 | 2 | 27 | \$1,834,417 |
| The Trustees of the University of Pennsylvania | 23-1352685 | 11 | 29 | 82 | \$1,543,750 |
| Saint Joseph's University | 23-1352674 | 5 | | 7 | \$1,200,000 |
| Philadelphia Museum of Art | 23-1365388 | 5 | 5 | 46 | \$1,175,025 |
| Community Partnership School | 20-3195763 | 5 | 4 | 24 | \$1,044,000 |
| Arden Theatre Company | 23-2521993 | 6 | 7 | 27 | \$1,030,650 |
| KIPP Philadelphia Schools | 05-0546103 | 4 | 3 | 17 | \$961,000 |
| St. Francis de Sales School | 23-1352450 | 3 | 1 | 15 | \$815,000 |
| Fox Chase Cancer Center | 23-2003072 | 3 | | 4 | \$807,000 |
| Children's Literacy Initiative | 23-2515768 | 6 | 3 | 21 | \$802,000 |
| The Mann Center for the Performing Arts | 23-1473884 | 5 | 3 | 16 | \$787,000 |
| La Salle University | 23-1352654 | 5 | 4 | 21 | \$759,600 |
| The Food Trust | 23-2678383 | 10 | 7 | 44 | \$736,275 |
| Temple University The Intergenerational Center | 23-1365971 | 11 | 12 | 44 | \$708,000 |
| Gwynedd-Mercy University | 23-1352613 | 6 | 4 | 23 | \$682,800 |
| Project H.O.M.E. | 23-2555950 | 7 | 5 | 26 | \$676,000 |

Top 20 Organizations by Number of Approved Grants:

| Organization Name | Tax Id | Number Of Foundations with Interaction | Total Denials | Total Approvals | Total Amount Granted* |
|--|------------|--|---------------|-----------------|-----------------------|
| West Catholic Preparatory High School | 23-1355131 | 4 | 1 | 125 | \$379,600 |
| Women's Medical Fund | 23-1727133 | 12 | 46 | 89 | \$620,499 |
| The Trustees of the University of Pennsylvania | 23-1352685 | 11 | 29 | 82 | \$1,543,750 |
| Philadelphia Museum of Art | 23-1365388 | 5 | 5 | 46 | \$1,175,025 |
| Temple University The Intergenerational Center | 23-1365971 | 11 | 12 | 44 | \$708,000 |
| The Food Trust | 23-2678383 | 10 | 7 | 44 | \$736,275 |
| University of PA Health System | 31-1538725 | 7 | 27 | 39 | \$2,083,063 |
| Greater Philadelphia Urban Affairs Coalition/ODAAT (One Day At A Time) | 23-7046393 | 9 | 22 | 31 | \$198,350 |
| American Red Cross Southeastern PA | 53-0196605 | 8 | 4 | 31 | \$267,250 |
| The Salvation Army | 13-5562351 | 8 | 10 | 30 | \$128,750 |
| The Academy of Natural Sciences | 23-1352000 | 6 | 4 | 30 | \$280,550 |
| Pennsylvania Academy of the Fine Arts | 23-1352256 | 4 | 3 | 30 | \$500,550 |
| 11th Street Family Health Services of Drexel University | 23-1352630 | 8 | 3 | 30 | \$2,132,653 |
| North Penn Valley Boys & Girls Club | 23-7164617 | 7 | 6 | 30 | \$269,250 |
| The Pennsylvania Horticultural Society | 23-1352265 | 4 | 3 | 29 | \$224,325 |
| VNA-Community Services, Inc. | 23-2363504 | 8 | 2 | 29 | \$440,500 |
| Community Volunteers in Medicine | 23-2944553 | 8 | 1 | 29 | \$518,000 |
| Philadelphia Futures | 23-1365983 | 5 | | 29 | \$464,500 |
| The Children's Hospital of Philadelphia (CHOP) | 23-1352166 | 2 | 2 | 27 | \$1,834,417 |
| The Children's Hospital of Philadelphia | 23-2237932 | 5 | 3 | 27 | \$183,600 |

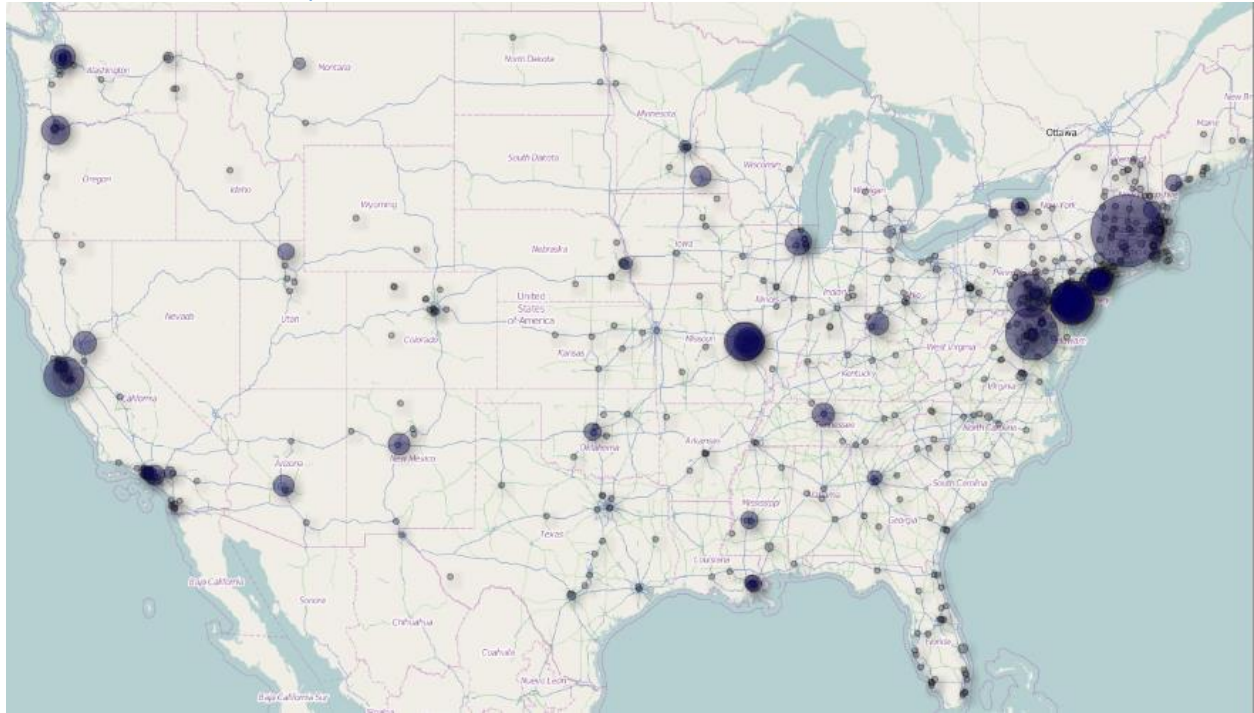
Top 10 Organizations based on application activity with the largest number of study participants:

| Organization Name | TaxId | Number Of Foundations with Interaction | Total Denials | Total Approvals | Total Amount Granted* |
|--|------------|--|---------------|-----------------|-----------------------|
| Minding Your Mind | 20-8448707 | 12 | 11 | 2 | \$5,200 |
| Women's Medical Fund | 23-1727133 | 12 | 46 | 89 | \$620,499 |
| The Trustees of the University of Pennsylvania | 23-1352685 | 11 | 29 | 82 | \$1,543,750 |
| Temple University The Intergenerational Center | 23-1365971 | 11 | 12 | 44 | \$708,000 |
| Kelly Anne Dolan Memorial Fund | 23-2108560 | 11 | 10 | 6 | \$20,750 |
| Philabundance | 23-2290505 | 10 | 8 | 21 | \$209,500 |
| The Food Trust | 23-2678383 | 10 | 7 | 44 | \$736,275 |

| | | | | | |
|-------------------------------------|------------|---|----|----|-----------|
| National Nursing Centers Consortium | 01-0560081 | 9 | 8 | 17 | \$134,500 |
| Cradles to Crayons | 04-3584367 | 9 | 10 | 26 | \$192,000 |
| CHOICE | 23-1894084 | 9 | 11 | 5 | \$23,000 |

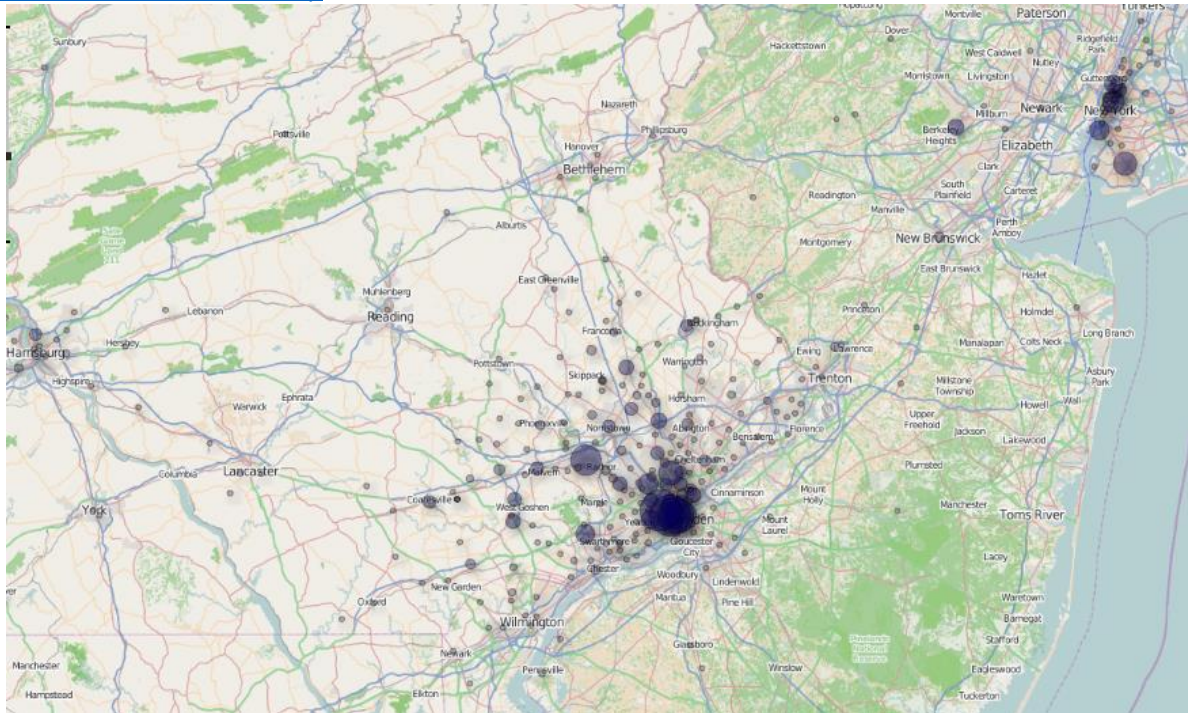
Heat map of aggregate funding in United States:

[Click Here to View Interactive Map](#)



Heat map of aggregate funding in Greater Philadelphia area:

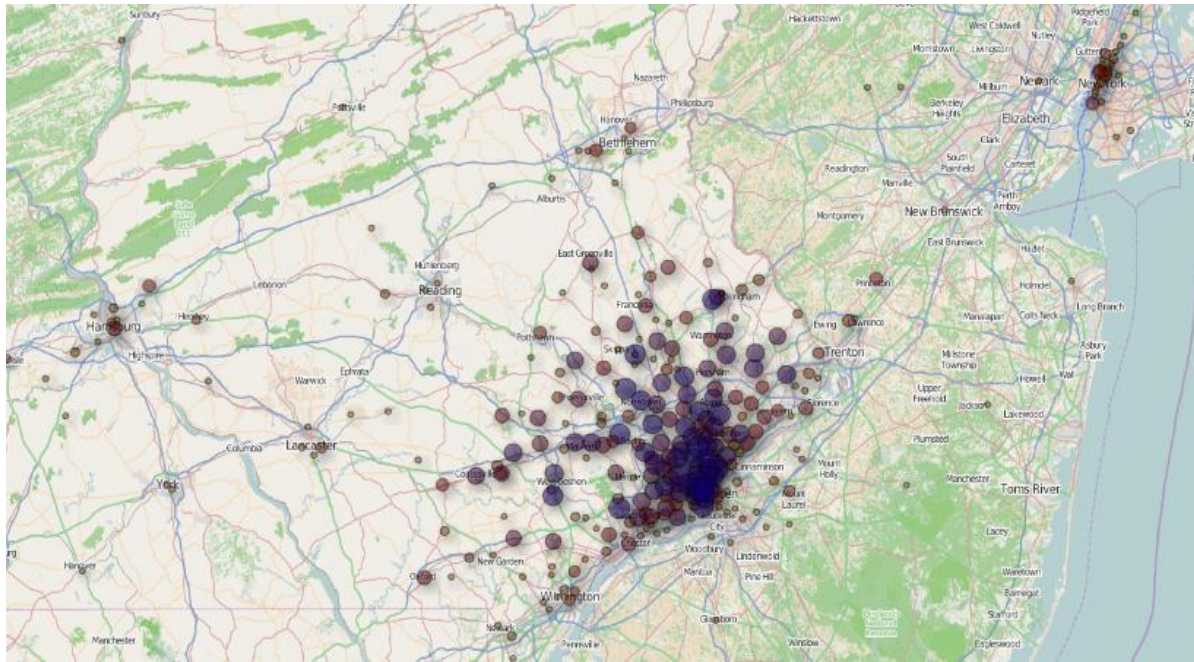
[Click Here to View Interactive Map](#)



Heat map of Number of Foundations by Zip:

(Zip codes that have received funding from two or more participating foundations)

[Click Here to View Interactive Map](#)



Summary: There is a significant amount of overlap in the organizations that are funded by the members of this study. It is unknown whether or not the group members are aware of the funding efforts of their peers to nonprofits in the community. Results seem to indicate that there are exciting opportunities for collaboration and information sharing in the relationships between the group members and the nonprofits they fund.

Participating Funders and Lengthy of Time Using Foundant Grant Lifecycle Manager:

| Participating Funder | Date First Admin User Created in Production Database |
|--|--|
| Genuardi Family Foundation | 2/13/2009 |
| Douty Foundation | 4/29/2009 |
| Patricia Kind Family Foundation | 5/6/2009 |
| The Barra Foundation | 12/16/2010 |
| Foundations Community Partnership | 3/4/2011 |
| Hamilton Family Foundation | 12/6/2011 |
| Oberkotter Foundation | 1/17/2012 |
| Union Benevolent Association | 2/3/2012 |
| North Penn Community Health Foundation | 5/7/2012 |
| Grace S. and W. Linton Nelson Foundation | 5/8/2012 |
| Partnership for Better Health | 6/6/2012 |
| Claneil Foundation | 7/9/2012 |
| Brandywine Health Foundation | 7/13/2012 |
| Anonymous Private Family Foundation | 12/3/2012 |
| Kendal Charitable Funds | 2/1/2013 |

| | |
|--------------------------------------|-----------|
| First Hospital Foundation | 2/8/2013 |
| Salem Health and Wellness Foundation | 6/19/2013 |
| The Presser Foundation | 8/2/2013 |
| Anonymous Private Family Foundation | 9/4/2013 |

Summary of Key Findings:

This informal and preliminary analysis of aggregate data from a group of Foundant clients in the Greater Philadelphia area provides a number of interesting and exciting findings that hopefully warrant additional investment from the participants. A few of these findings are summarized below:

- There is significant commonality in the types of information funders are requesting from nonprofits both pre and post-award. Additionally, nearly seven hundred (700) nonprofits had grant application activity with at least four (4) of the funders in the group over the past five years. Further adoption of initiatives such as Simplify, GuideStar Exchange and Project Streamline all could help limit duplicate efforts for nonprofits while also providing better information to funders. Streamlining the operations of such a large number of nonprofits and funders would have a significant efficiency impact on the philanthropic sector in the region.
- As expected, a significant portion of application activity and actual funding impacts organizations within a fairly confined geographic region around Greater Philadelphia. This seems to indicate that outreach and adoption for national initiatives such as Simplify and GuideStar Exchange could be most beneficial at a local level where nonprofits and funders will realize the actual benefit.
- Increasing visibility of activity between funders would likely help identify collaborative opportunities. Nearly seven hundred nonprofits had interaction with at least four members of the funder group and it is not known whether the funders are currently aware of their peers' activity with these nonprofits.